



TACOMA HOUSING AUTHORITY

BOARD OF COMMISSIONERS

BOARD PACKET

June 23, 2021



**Tacoma
Housing
Authority**

Executive Director
Michael Mirra

Board of Commissioners

Stanley Rumbaugh, Chair | Shennetta Smith, Vice Chair
Dr. Minh-Anh Hodge | Derek Young | Pastor Michael Purter

REGULAR MEETING Board of Commissioners

WEDNESDAY, JUNE 23, 2021

The Board of Commissioners of the Housing Authority of the City of Tacoma will hold a Regular Meeting on **Wednesday, June 23, 2021, at 4:45 pm** via Zoom.

<https://us02web.zoom.us/j/84926276303> / Meeting ID: 849 2627 6303 / Dial: (253) 215-8782

The site is accessible to people with disabilities. Persons who require special accommodations should contact Sha Peterson (253) 207-4450, before 4:00 pm the day before the scheduled meeting.

I, Sha Peterson, certify that on or before June 16, 2021, I FAXED/EMAILED, the preceding PUBLIC MEETING NOTICE before:

City of Tacoma 747 Market Street fax: 253-591-5300

Tacoma, WA 98402

CityClerk@cityoftacoma.com

Northwest Justice Project 715 Tacoma Avenue South fax: 253-272-8226

Tacoma, WA 98402

KCPQ-TV/Channel 13 1813 Westlake Avenue North tips@q13fox.com

Seattle, WA 98109

KSTW-TV/CW 11 2211 Elliott Avenue, Suite 200

Seattle, WA 98121

Tacoma News Tribune 1950 South State

Tacoma, WA 98405

and other individuals and organizations with residents reporting applications on file.

Sha Peterson
Executive Administrator



TACOMA HOUSING AUTHORITY

AGENDA REGULAR BOARD OF COMMISSIONERS MEETING June 23, 2021, 4:45 PM

Join Zoom Meeting

<https://us02web.zoom.us/j/84926276303> / Meeting ID: 849 2627 6303 / Dial: (253) 215-8782

- 1. CALL TO ORDER**
- 2. ROLL CALL**
- 3. APPROVAL OF MINUTES**
3.1 Minutes of May 26, 2021—Regular Meeting
- 4. GUEST COMMENTS**
- 5. COMMITTEE REPORTS**
 - 1.1 Real Estate Development Committee
 - 2.1 Finance Committee
 - 3.1 Community Partnerships Committee
 - 4.1 Education Committee
 - 5.1 Diversity, Equity, and Inclusion Committee (no regular meeting)
- 6. COMMENTS FROM THE EXECUTIVE DIRECTOR**
- 7. ADMINISTRATION REPORTS**
 - 7.1 Finance
 - 7.2 Policy, Innovation and Evaluation
 - 7.3 Client Support and Empowerment
 - 7.4 Rental Assistance
 - 7.5 Property Management
 - 7.6 Real Estate Development
- 8. NEW BUSINESS**
 - 8.1 2021-06-23 (1) Executive Action to Extend the Moratorium on Time Limits
 - 8.2 2021-06-23 (2) Power of Eminent Domain for Acquisition of Affordable Housing
 - 8.3 2021-06-23 (3) North Highland Court Acquisition
 - 8.4 2021-06-23 (4) Authorize Investment Institutions and Authorized Signers
 - 8.5 2021-06-23 (5) Extending Collective Bargaining Agreement with OPEIU
 - 8.6 2021-06-23 (6) Replacement Omnibus Resolution for Hilltop Lofts
 - 8.7 2021-06-23 (7) Acquisition of the Unionaire Apartments by Condemnation or Negotiated Purchase in Lieu Thereof
- 9. EXECUTIVE SESSION**
Evaluate the Qualifications of an Applicant
- 10. COMMENTS FROM THE COMMISSIONERS**
- 11. ADJOURNMENT**



TACOMA HOUSING AUTHORITY

MINUTES



TACOMA HOUSING AUTHORITY

BOARD OF COMMISSIONERS MEETING MINUTES REGULAR SESSION WEDNESDAY, MAY 26, 2021

The Commissioners of the Housing Authority of the City of Tacoma met in Regular Session via Zoom at 4:45 PM on Wednesday, May 26, 2021.

1. CALL TO ORDER

Chair Rumbaugh called the meeting of the Board of Commissioners of the Housing Authority of the City of Tacoma (THA) to order at 4:45 pm.

2. ROLL CALL

Upon roll call, those present and absent were as follows:

PRESENT	ABSENT
Commissioners	
Chair Stanley Rumbaugh	
	Vice Chair Shennetta Smith
Commissioner Derek Young	
Commissioner Dr. Minh-Anh Hodge (arrived late at 6:10 pm)	
Commissioner Pastor Michael Purter (left early at 6:17 pm)	
Staff	
Michael Mirra, Executive Director	
Sha Peterson, Executive Administrator	
April Black, Deputy Executive Director	
Rich Deitz, Interim Finance Director	
Lorraine Viers, Human Resources Director	
Frankie Johnson, Property Management Director	
Kathy McCormick, Real Estate Development Director	
Sandy Burgess, Administrative Services Director	
Julie LaRocque, Rental Assistance Director	
Cacey Hanauer, Client Support & Empowerment Director	

Chair Rumbaugh declared there was a quorum present @ 4:46 pm and proceeded.

3. APPROVAL OF MINUTES OF THE PREVIOUS MEETING

Chair Rumbaugh asked for any corrections to, or discussion of the minutes for the Regular Session of the Board of Commissioners on Wednesday, April 28, 2021. Commissioner Purter moved to adopt the minutes. Commissioner Young seconded.

Upon roll call, the vote was as follows:

AYES:	3
NAYS:	None
Abstain:	None
Absent:	2 (Commissioner Hodge was not yet present for the meeting)

Motion approved.

4. GUEST COMMENTS

Melissa Littleton, Tacoma Community College (TCC) Student

Ms. Littleton is a TCC student. She spoke about the importance of the housing assistance from THA's College Housing Opportunity Program (CHOP). But, she noted, students need more vouchers than presently available from CHAP. There are 160 students on the waitlist and 53 of them are experiencing homelessness. Ms. Littleton said that she is planning a student-wide survey to better understand what housing insecurity looks like.

Chair Rumbaugh said THA designated 150 vouchers to the program, which are fully utilized. Director LaRocque confirmed that the vouchers are in fact fully utilized. She noted that THA is currently looking at changes to the CHOP program to make it more useful. She mentioned the 134 new emergency housing vouchers THA will be getting from HUD. Executive Director Mirra asked if any of those vouchers might be available to TCC students on the CHAP waiting list. Director LaRocque and Ms. Littleton will confer about that possibility. Chair Rumbaugh thanks Ms. Littleton for addressing the board. He invited her to attend future board meetings.

5. COMMITTEE REPORTS

Real Estate Development Committee—Chair Rumbaugh, Commissioner Young

The committee met and discussed acquisition opportunities and ongoing development schedule for properties on Hilltop, James Center North, and Michael's Plaza. The committee also discussed Gault Middle School.

Finance Committee—Commissioner Hodge and Commissioner Young

Did not meet.

Education Committee—Vice Chair Smith, Commissioner Hodge

Vice Chair Smith and Commissioner Hodge were not in attendance.

Citizen Oversight Committee—Vice Chair Smith, Commissioner Purter

Commissioner Purter had a tour of the 902 building with Vickie Stark. He will have another tour of THA properties with Director Black. He shared his thoughts on how to put together the virtual touring of THA properties. Director Black will ask Director Johnson and Nick Tolley to build on what Commissioner Purter already proposed to the board.

Diversity, Equity and Inclusion Committee—Vice Chair Smith, Commissioner Hodge
Both Vice Chair Smith and Commissioner Hodge were not in attendance.

6. COMMENTS FROM THE EXECUTIVE DIRECTOR

Executive Director (ED) Michael Mirra directed the board to his report. THA reached a settlement concerning its exercise of its contractual right to buy the properties collectively called The Trees. By this settlement, THA will forsake its right to purchase in exchange for \$12 million. By this settlement, the owner will deposit \$1.5 million earnest money in escrow. About 12% of that amount is dedicated to Key Bank. If the owner does not pay the \$12 million by November 1st, THA will collect its share of the \$1.5 million deposit and it will consummate its purchase of the properties at a price that an independent appraiser will determine in July.

This is Director McCormick's last meeting before moving to Colorado. Chair Rumbaugh thanked Director McCormick for sharing her real estate development knowledge and expertise with THA. Commissioner Young stated that it has been absolutely a joy working with Director McCormick. Commissioner Purter appreciates what she has shared with the board and wished her the best. Executive Director Mirra noted her impressive accomplishments at THA: the completion of Salishan, Bay Terrace, The Rise on 19th, Arlington Drive Campus, the complete refinancing and rehabilitation of the rest of THA's portfolio, transitioning it from public housing financing to Section 8 financing. Also, she set THA up with an ambitious pipeline of further development and property purchases that will keep THA busy for 5 years. Throughout all this, she showed the qualities of focus, fearlessness, and partnerships that this work requires.

Human Resources Director Lorraine Viers reviewed the plans to recruitment the next Executive Director recruitment. The process will include the Board's search subcommittee, which Chair Rumbaugh stated will include himself and Commissioner Young. The process will include interview panels of staff and community partners. It will conclude with the full Board's interview of the finalists. The Board discussed the details of the process, the places to advertise, and whether or not the process can indeed conclude by September. Director Viers said she thought September was doable.

Director Viers asked the Board to approve her choice of a search firm that she procured. She and Director Burgess explained that this is a small procurement of \$14,000 that THA may select from among three candidates that she canvased. Chair Rumbaugh entertained a motion to hire Organizational Leadership Edge, not-to-exceed \$14k plus documented

expenses. Commissioner Young moved to approve the motion. Commissioner Purter seconded the motion.

AYES: 3

NAYS: None

Abstain: None

Absent: 2 (Commissioner Hodge was not yet in attendance and Vice Chair Smith will not be attending the meeting)

Motion Approved: May 26, 2021

Stanley Rumbaugh, Chair

Director Viers will create a project outline that will be shared with the board. Chair Rumbaugh appointed himself and Commissioner Young for the ED search sub-committee. If Commissioner Hodge would like to join, Chair Rumbaugh will be happy to speak with her. Commissioner Purter would like to be part of the review of the candidates and would like to see the screening process the sub-committee will use. Director Viers will ask the search firm to reach out to the board.

ED Mirra discussed interim Cabinet changes:

- Roberta and Karen will step in as co-directors for Real Estate Development
- Rich has stepped in as Interim Finance Director
- April will be stepping up as Interim Executive Director
- Julie will be stepping up as Interim Deputy Executive Director
- Aley will be stepping up as Interim Rental Assistance Director
- Katie will be stepping up as Interim Policy, Innovation and Evaluation Director

ED Mirra noted that, for these interim positions, THA found what it needed from present staff. He said that is a very good sign of THA's strength.

"To everyone moving to a new position, whether interim or permanent, or whether interim becomes permanent, we have been working with the same crew for many years," stated Chair Rumbaugh. He encouraged them to find their own way. "The goal is to get the job done and to make their mark," he added.

7. ADMINISTRATIVE REPORTS

Finance

Finance Department (FD) Interim Director Rich Deitz directed the board to the finance report. Staff are finalizing the 2020 submission to the state. The finance report contains Q1 financials.

Commissioner Young moved to ratify the payment of cash disbursements totaling \$5,863,002 for the month of April 2021. Commissioner Purter seconded.

Upon roll call, the vote was as follows:

AYES:	3
NAYS:	None
Abstain:	None
Absent:	2 (Commissioner Hodge was not yet present for the meeting and Vice Chair Smith will not be attending the meeting)

Motion Approved.

Administrative Services

Administrative Services (AS) Director Sandy Burgess directed the board to her report. She introduced her new staff members:

- Karessa Bowman, Risk Manager
- William Morse, CIO
- Sandy Bigelow, Contracts and Procurement Manager
- Shannon Smith, Compliance Auditor
- Karen Bunce, Department Manager
- Rebecca Spencer, Asset Manager

AS is not fully staffed yet. IT is assessing the effectiveness of OpenDoor. AS is also looking at an electronic management system and implementing safer systems policy.

The first quarter Per Unit Per Year (PUPY) is under budget with a variety of reasons, but it is consistently trending down.

Client Support and Empowerment

Client Support and Empowerment (CSE) Director Cacey Hanauer directed the board to her report. CSE staff are deep in strategic planning. They are trying to reinvest in communities. The Grand will likely be bringing movies to properties for an outdoor theater. The vaccine project reached 200 persons between family properties and senior disabled buildings. Martha led that effort. Staff found that 60-70% of tenants had already been vaccinated.

Rental Assistance

Rental Assistance (RA) Director Julie LaRocque directed the board to her report. She noted that THA received 134 emergency vouchers from HUD. THA accepted the vouchers and asked for another 134. The vouchers are one time vouchers, which means THA cannot reissue the vouchers after a person gives it back. The HUD rules require THA to coordinate with the county's Continuum of Care (COC) to use these vouchers. THA is negotiating an agreement with COC and Pierce County on the terms of this coordination. It will rely on the county's Coordinated Entry Rapid Rehousing system to refer persons to THA to receive the vouchers. ED Mirra asked if CHAP students are

eligible for the emergency vouchers. Director LaRocque responded that students can apply through Coordinated Entry.

Director LaRocque noted some departures from RA:

- Cathy Forslund retired from THA;
- Jessie Beck put in her notice to move back to Cleveland (she will be working remotely through the end of the year).

The Property Based Subsidy (PBS) program training was held in April. The credit goes to Vernetta Johnson. Chair Rumbaugh inquired about the Veteran's Affairs Supportive Housing (VASH) program and asked if the unused vouchers can get reassigned to a program that can utilize those vouchers. No, responded Director LaRocque.

Property Management

Property Management (PM) Director Frankie Johnson had to step away from the meeting. Director Black reported on her behalf. There is a backlog of work orders that piled up during the pandemic. PM staff are devising a strategy to address it once the rules allow staff to enter units for non-emergency work orders. Director Johnson provided information on her report regarding The Rise and a comparison data on page 5. PM staff are also providing tenants resources to help pay delinquent rents.

Real Estate Development

Real Estate Development (RED) Director Kathy McCormick directed the board to her report. She showed a video of Arlington Drive. There have been three projects RED has been working on—Arlington Drive, Hilltop Project and James Center North. Director McCormick reviewed RED's five-year plan, which is included in her report.

8. NEW BUSINESS

8.1 RESOLUTION 2021-05-26 (1) (Rapid Acquisition Properties)

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

Whereas, The resolution authorizes THA's Executive Director to negotiate and execute Purchase and Sale agreements to further THA's goals to acquire multifamily properties that will provide modestly priced rental housing; and

Whereas, Time is of the essence as THA has secured funding for equity and is willing and able to use THA resources to supplement those funds; and

Whereas, Sellers are made aware of the advantages of selling to a Public Housing Authority as part of the transaction. These include favorable financing and options

to extend the time for capital gains to be reinvested. The ability to execute agreements efficiently, along with the advantages will make THA competitive when acquiring properties; and

Whereas, All Purchase and Sale Agreements will be subject to securing appropriate financing and final Board approval; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

THA's Executive Director is authorized to negotiate and, if those negotiations are successful, to execute Purchase and Sale Agreements to acquire multifamily properties. All such purchases will be subject to THA's due diligence and Board final approval.

Commissioner Young motioned to approve the resolution. Commissioner Purter seconded the motion.

AYES:	3
NAYS:	None
Abstain:	None
Absent:	2 (Commissioner Hodge was not yet present for the meeting and Vice Chair Smith will not be attending the meeting)

Motion Approved: May 26, 2021

Stanley Rumbaugh, Chair

8.2 RESOLUTION 2021-05-26 (2) (Authorization to Adopt New Procurement Policy)

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

WHEREAS, The Housing Authority of the City of Tacoma (the "Authority") has a policy governing procurement of goods and services, THA Policy PCI-01-Procurement Policy. It needs amendment to allow for Design-Build procurement for construction; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

1. THA adopts as new THA Policy PCI-01-Procurement Policy in substantially the form set out in the attached draft. Staff may further amend the policy without Board review for purposes of minor clarification, formatting changes and the addition or modification of flow charts and other visualization, and forms.

2. Ratification and Confirmation. Any actions of the Authority or its officers prior to the date hereof and consistent with the terms of this resolution are ratified and confirmed.

Commissioner Young motioned to approve the resolution. Commissioner Purter seconded the motion.

Upon roll call, the vote was as follows:

AYES:	3
NAYS:	None
Abstain:	None
Absent:	2 (Commissioner Hodge was not yet present for the meeting and Vice Chair Smith will not be attending the meeting)

Motion Approved: May 26, 2021

Stanley Rumbaugh, Chair

8.3 RESOLUTION 2021-05-26 (3)
(Approval of Revision to the Administrative Plan – Shared Housing)

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

WHEREAS, The purpose of the Administrative Plan is to establish policies for carrying out programs in a manner consistent with HUD requirements and local goals and objectives contained in THA's Moving to Work Plan; and

WHEREAS, Changes to the Administrative Plan must be approved by THA Board of Commissioners; now therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

THA's Executive Director is authorized to revise THA's Administrative Plan related to Shared Housing in the ways that show in the chart on the following page.

Section	Title	Proposed Policy Change
PART IV: SHARED HOUSING Page 389	15-IV.A. OVERVIEW	<p>Shared housing is a single housing unit occupied by an assisted family and another resident or residents. The shared unit consists of both common space for use by the occupants of the unit and separate private space for each assisted family.</p> <p>An assisted family may share a unit with other persons assisted under the HCV and/or HOP program or with other unassisted persons. The owner of a shared housing unit may reside in the unit, but housing assistance may not be paid on behalf of the owner. The resident owner may not be related by blood or marriage to the assisted family.</p> <p>If approved by the PHA, a live-in aide may reside with the family to care for a person with disabilities. The PHA must approve a live-in aide if needed as a reasonable accommodation so that the program is readily accessible to and usable by persons with disabilities.</p> <p>When providing HCV or HOP assistance in shared housing, a separate lease and HAP/HOPP contract are executed for each assisted family, and the standard form of the HAP/HOPP contract is used.</p>
CHAPTER 15 - SPECIAL HOUSING TYPES Page 383	INTRODUCTION	<p>The PHA may permit a family to use any of the special housing types discussed in this chapter. However, the PHA is not required to permit families receiving assistance in its jurisdiction to use these housing types, except that PHAs must permit use of any special housing type if needed as a reasonable accommodation for a person with a disability. The PHA also may limit the number of families who receive HCV assistance in these housing types and cannot require families to use a particular housing type. No special funding is provided for special housing types.</p> <p><u>THA Policy</u> Families will be able to utilize the following special housing types:</p> <ul style="list-style-type: none"> • Homeownership • Manufactured Homes • Shared Housing <p>The PHA will permit an assisted family to share a unit</p>

Section	Title	Proposed Policy Change
		<p style="color: red;">with other persons assisted under the HCV and/or HOP program or with other unassisted persons.</p> <p>Besides the units listed above, families will not be permitted to use any other special housing types, unless use is needed as a reasonable accommodation so that the program is readily accessible to a person with disabilities.</p> <p>Special housing types include single room occupancy (SRO), congregate housing, group homes, shared housing, cooperative housing, manufactured homes where the family owns the home and leases the space, and homeownership [24 CFR 982.601].</p>
Chapter 19 College Housing Assistance Program Page 549	PART I: INTRODUCTION	<p>This document is meant to guide staff in administering the tenant-based subsidy portion of College Housing Assistance Program. This program will help to house enrolled college students and their households who are struggling with housing and/or homeless. It seeks to use THA's housing resources; not only to house a needy household, but to promote educational outcomes that will help assisted persons become self-sufficient.</p> <p>The program will offer housing assistance similar to that of our HOP subsidy (50% of the payment standard) and will have a five (5) year limit on assistance. The college will provide services designed to help the students succeed so they graduate and are ready to be independent of housing subsidies upon graduation. The program differs significantly from the traditional Section 8 program and THA's HOP with different eligibility requirements and time limits.</p> <p>The annual review of income process will be abbreviated and clients will be allowed to lease up in units not normally allowed in the Section 8 program. This flexibility includes renting from relatives. or shared housing units. Housing Assistance Payments (HAP) contracts and leases may differ from the normal 12 months if necessary. THA will change forms and documents if necessary in order to run the program. The subsidies will not be portable since they are only for Tacoma college students. The post-secondary institution will choose the students for the program. The post-secondary institution will establish and use a system to identify from among eligible students those most in need.</p>

Section	Title	Proposed Policy Change
		<p>The duration of the assistance will be limited to five (5) years and requires during that time that the client be enrolled in a degree program and make adequate academic process toward a degree. The post-secondary institution will determine whether a person's academic progress is adequate.</p> <p>Participants who complete the credits required to graduate with an Associate's or Bachelor's degree may receive up to one (1) year of additional housing payment assistance or five (5) total years of assistance. The additional time (up to one year) will begin at the time the credits were completed. Participants who re-enroll in CHAP will be subject to the five year time limit less the amount of time they previously spent on the program.</p>
Chapter 19 College Housing Assistance Program Page 554	PART IX: DWELLING UNITS	<p>The Housing Quality Standards (HQS) described in Chapter 8, Local Inspection Standards, of the Administrative Plan for the tenant-based subsidy program apply to the College Housing Assistance Program. Using MTW flexibility, THA will allow households to lease a unit that would not typically be allowed under the traditional voucher program. This flexibility will include shared housing units, renting from relatives. and renting bedrooms. THA will look at each request individually to ensure the unit would be safe, decent and sanitary. THA would only allow a household to lease up in a relative's unit if they were suffering a hardship. That would include:</p> <ul style="list-style-type: none"> • A household that would rely on the relative to help with childcare; • A household that cannot lease up because of poor credit; • A household that cannot lease because of poor rental history; • A household that cannot lease because of a poor criminal history but has met THA's criminal screening criteria.

Commissioner Young motioned to approve the resolution. Commissioner Purter seconded the motion.

Upon roll call, the vote was as follows:

AYES: 3
NAYS: None

Abstain: None
Absent: 2 (Commissioner Hodge was not yet present for the meeting and Vice Chair Smith will not be attending the meeting)

Motion Approved: May 26, 2021

Stanley Rumbaugh, Chair

**8.4 RESOLUTION 2021-05-26 (4)
(Proposed Changes to Tacoma Housing Authority's Criminal Screening Policies)**

A RESOLUTION of the Board of Commissioners of the Housing Authority of the City of Tacoma

WHEREAS, The Administrative Plan relates to the administration of the Housing Choice Voucher program and is required by HUD; and

WHEREAS, The Administrative Plan establishes policies for carrying out programs in a manner consistent with HUD requirements and local goals and objectives; and

WHEREAS, Changes to the Administrative Plan must be approved by THA Board of Commissioners; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

Staff is authorized to adopt the following updates to the administrative Plan to reflect the proposed policy changes:

PART III: DENIAL OF ASSISTANCE

3-III.A. OVERVIEW

A family that does not meet the eligibility criteria discussed in Parts I and II, must be denied assistance.

In addition, HUD requires or permits the PHA to deny assistance based on certain types of current or past behaviors of family members.

Forms of Denial [24 CFR 982.552(a)(2); HCV GB, p. 5-35]

Denial of assistance includes any of the following:

- Not placing the family's name on the waiting list
- Denying or withdrawing a voucher
- Not approving a request for tenancy or refusing to enter into a HAP contract
- Refusing to process a request for or to provide assistance under portability procedures

Prohibited Reasons for Denial of Program Assistance [24 CFR 982.202(b), 24 CFR 5.2005(b)(1)]

HUD rules prohibit denial of program assistance to the program based on any of the following criteria:

- Age, disability, race, color, religion, sex, or national origin. (See Chapter 2 for additional information about fair housing and equal opportunity requirements.)
- Where a family lives prior to admission to the program
- Where the family will live with assistance under the program. Although eligibility is not affected by where the family will live, there may be restrictions on the family's ability to move outside the PHA's jurisdiction under portability. (See Chapter 10, Portability.)
- Whether members of the family are unwed parents, recipients of public assistance, or children born out of wedlock
- Whether the family includes children
- Whether a family decides to participate in a family self-sufficiency program
- Whether or not a qualified applicant has been a victim of domestic violence, dating violence, sexual assault or stalking if the applicant is otherwise qualified for assistance.

3-III.B. MANDATORY DENIAL OF ASSISTANCE [24 CFR 982.553(a)]

HUD requires the PHA to deny assistance in the following cases:

- Any member of the household has been evicted from federally-assisted housing in the last 3 years for drug-related criminal activity. HUD permits, but does not require, the PHA to admit an otherwise-eligible family if the household member has completed a PHA-approved drug rehabilitation program or the circumstances which led to eviction no longer exist (e.g., the person involved in the criminal activity no longer lives in the household).

THA Policy

The PHA will admit an otherwise-eligible family who was evicted from federally-assisted housing within the past 35 years for drug-related criminal activity, if the PHA is able to verify that the household member who engaged in the criminal activity has completed a supervised drug rehabilitation program approved by the PHA, or the person who was involved in the drug-related criminal activity, is no longer living in the household and that person can provide proof of another residence.

- The PHA determines that any household member is currently engaged in the use of illegal drugs.

THA Policy

Currently engaged in is defined as any use of illegal drugs during the previous twelve months.

Note: **marijuana** is a federally controlled substance and THA prohibits admission to its housing programs for any household with a member who the THA determines is illegally using a controlled substance. THA has the option to deny assistance or terminate specific marijuana users rather than the entire household for both applicant and existing tenants when appropriate. THA has discretion to determine, on a case-by-case basis, the appropriateness of program termination of existing residents for the use of medical marijuana.

- The PHA has reasonable cause to believe that any household member's current use or pattern of use of illegal drugs, or current abuse or pattern of abuse of alcohol, may threaten the health, safety, or right to peaceful enjoyment of the premises by other residents.

THA Policy

In determining reasonable cause, the PHA will consider all credible evidence,

including but not limited to, any record of convictions, arrests, or evictions of household members related to the use of illegal drugs or the abuse of alcohol. A conviction will be given more weight than an arrest. The PHA will also consider evidence from treatment providers or community-based organizations providing services to household members. If a person's criminal background investigation indicates there is a current case for a criminal charge active in court, the application process will be placed on hold until the case is adjudicated and a determination can be made on the applicant's eligibility to receive assistance from THA.

Any household member has ever been convicted of drug-related criminal activity for the production or manufacture of methamphetamine on the premises of federally assisted housing.

THA Policy

THA will deny assistance to any household that has ever been convicted of drug-related activity for the production or manufacture of methamphetamine.

THA Policy

THA will deny assistance to any household that has a household member who is subject to a registration requirement under a state sex offender registration program THA will use a national registry to check for sex-offender status.¹

The HUD VASH program will follow the requirements of the program for the program

3-III.C. OTHER PERMITTED REASONS FOR DENIAL OF ASSISTANCE

HUD permits, but does not require, the PHA to deny assistance for the reasons discussed in this section.

Criminal Activity [24 CFR 982.553]

HUD permits, but does not require, the PHA to deny assistance if the PHA determines that any household member is currently engaged in, or has engaged in during a reasonable time before the family would receive assistance, certain types of criminal activity.

THA Policy

For THA voucher and third-party PBV programs: THA will only screen for HUD mandated denials.

For THA's Portfolio: If any household member is currently engaged in, or has engaged in been convicted of any of the following criminal activities, within the past

five years, the family's application will be considered after further review in accordance with the automatic review policies indicated in section 3-III.E. They will be denied assistance. A household will require an additional review if either of the following are true:

1. Any of its members has a qualifying felony offense that occurred within two years of application review; or,
2. If a member's date of release from total confinement occurred less than one year prior to the application review even if they did not commit further qualifying offenses within that year.

For example, if the following applicants are screened for eligibility on 05/01/2021:

Applicant A was convicted of a qualifying felony offense in May 2017 (more than two years previous) and was released from total confinement in June 2020 (less than one year previous). Applicant A's application would be subject to further review because the date of release from total confinement occurred less than one year prior to the application review date.

Applicant B was convicted of a qualifying felony offense in June 2019 (less than two years previous) and was released from total confinement in April 2020 (more than one year previous). Applicant B's application would be subject to further review because the felony offense happened within two years of the application review date.

Applicant C was convicted of a qualifying felony offense in June 2003 (more than two years previous) and was released from total confinement in January 2020 (more than one year previous). If otherwise eligible for assistance, Applicant C would be granted admission to housing.

The additional review will be done in accordance with the automatic review policies indicated in section 3-III.E and a qualifying felony offense is defined as a felony-level conviction of the following criminal activities:

Drug-related criminal activity, defined by HUD as the illegal manufacture, sale, distribution, or use of a drug, or the possession of a drug with intent to manufacture, sell, distribute or use the drug [24 CFR 5.100].

Violent criminal activity, defined by HUD as any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage [24 CFR 5.100].

Criminal activity that may threaten the property, or health, safety, or right to peaceful

enjoyment of the premises by other residents or persons residing in the immediate vicinity; or

Criminal activity that may threaten the health or safety of property owners and management staff, and persons performing contract administration functions or other responsibilities on behalf of the PHA (including a PHA employee or a PHA contractor, subcontractor, or agent).

Immediate vicinity means within a three-block radius of the premises.

Evidence of such criminal activity includes, but is not limited to:

Any conviction for drug-related or violent ~~criminal activity~~felonies within the past 25 years.

~~Records of arrests for drug related or violent criminal activity within the past 5 years, although a record of arrest(s) will not be used as the basis for the denial or proof that the applicant engaged in disqualifying criminal activity.~~ Any record of eviction from public or privately-owned housing as a result of criminal activity within the past 25 years.

~~A conviction for drug related or violent criminal activity will be given more weight than an arrest for such activity.~~

THA reserves the right to ~~deny assistance~~conduct further reviews of households who have applicants who have committed serious crimes more than 25 year ago. Examples of serious crimes include but are not limited to: homicide, pattern of criminal activity, felony assault, arson, or any other crimes that could threaten the health, safety or right to peaceful enjoyment of other persons in the immediate vicinity.

If a person's criminal background investigation indicates there is a current case for a criminal charge active in court, the application process will be placed on hold until the case is adjudicated and a determination can be made on the applicant's eligibility to receive assistance.

In making its decision to deny assistance, the PHA will consider the factors discussed in Section 3-H.E. Upon consideration of such factors, the PHA may, on a case-by-case basis, decide not to deny assistance.

Previous Behavior in Assisted Housing [24 CFR 982.552(c)]

HUD authorizes the PHA to deny assistance based on the family's previous behavior in assisted housing:

THA Policy

The PHA will not deny assistance to an otherwise eligible family because the family

previously failed to meet its obligations under the Family Self-Sufficiency (FSS) program.

The PHA will deny assistance to an applicant family if:

The family does not provide information that the PHA or HUD determines is necessary in the administration of the program.

The family does not provide complete and true information to the PHA.

Any family member has been evicted from federally-assisted housing in the last five years.

Any family member has committed fraud, bribery, or any other corrupt or criminal act in connection with any federal housing program.

The family owes rent or other amounts to any PHA in connection with the HCV, Certificate, Moderate Rehabilitation or public housing programs, unless the family repays the full amount of the debt prior to being selected from the waiting list.

If the family has not reimbursed any PHA for amounts the PHA paid to an owner under a HAP contract for rent, damages to the unit, or other amounts owed by the family under the lease, unless the family repays the full amount of the debt prior to being selected from the waiting list.

The family has breached the terms of a repayment agreement entered into with the PHA, unless the family repays the full amount of the debt covered in the repayment agreement prior to being selected from the waiting list.

A family member has engaged in or threatened violent or abusive behavior toward PHA personnel or anyone acting on behalf of the housing authority.

Abusive or violent behavior includes verbal as well as physical abuse or violence. Use of racial epithets, or other language, written or oral, that is customarily used to intimidate may be considered abusive or violent behavior.

Threatening refers to oral or written threats or physical gestures that communicate intent to abuse or commit violence.

In making its decision to deny assistance, the PHA will consider the factors discussed in Section 3-III.E. Upon consideration of such factors, the PHA may, on a case-by-case basis, decide not to deny assistance.

3-III.D. SCREENING

Screening for Eligibility

PHAs are authorized to obtain criminal conviction records from law enforcement agencies to screen applicants for admission to the HCV program. This authority assists the PHA in complying with HUD requirements and PHA policies to deny assistance to applicants who are engaging in or have engaged in certain criminal activities. In order to obtain access to the records the PHA must require every applicant family to submit a consent form signed by each adult household member [24 CFR 5.903].

THA Policy

The PHA will perform a criminal background check through local law enforcement for every household member 18 years of age and older over the age of 16.

If the results of the criminal background check indicate that there may be past criminal activity, but the results are inconclusive, the PHA will request information from an external screening company.

If an applicant's or household member's criminal record reflects convictions that are of concern to THA, an Application Review Panel consisting of three THA staff members will conduct the reviews in accordance with the following procedures:

21. Notification to applicants: THA staff will notify applicants requiring a review in writing that their application was subject to further review based on the criminal history of the applicants. This notification will provide the conviction information and a notice explaining the procedures of the review and the timeframe to provide supporting document(s).

32. Documents to support an application. The applicant bears no burden of proof. However, the applicant may provide the following evidence to support their application:

- A positive record while incarcerated (e.g., program participation, low rates of incidents, etc.);
- Completion of a higher education degree or vocational program(s);
- Steady employment or holding of a position of meaningful responsibility;
- Successful completion of established drug rehabilitation program;
- Completion of a restorative justice program;
- Completion of an anger management program; or
- Letters of support from community groups, parole officers, employers, or other responsible parties in a position to vouch for the applicant.

43. Decision-making process and decisions. THA staff conducting the automatic review will review all relevant information. After THA staff reviews all the information, the staff will vote to allow or deny assistance. In determining a decision, THA staff may take into account the following factors:

- Criminal history, including time since most recent conviction, time since release from prison or jail, and number and nature of conviction(s);
- Rehabilitation, including history of drug and alcohol use, substance use treatment participation and completion, and tenure on community supervision;
- Community ties and support, including family ties, household composition, support networks (both who supports the applicant and who the applicant supports), and involvement in community groups; and
- Employment and education history, including current employment, employment stability, and current participation in education or training programs.

THA staff may consider other factors other than those listed above that they deem relevant. If any other factors were considered in the decision other than those listed above, THA staff will specify the factors and explain the factors in the decision making process. For any denial based on a household member's criminal record, THA may provide assistance to the remaining household members after excluding the denied family member.

THA will make its determination on the day of the review unless THA staff determines additional information is required to make their decision. THA will follow a majority rule to make a decision.

PHAs are required to perform criminal background checks necessary to determine whether any household member is subject to a lifetime registration requirement under a state sex offender program in the state where the housing is located, as well as in any other state where a household member is known to have resided [24 CFR 982.553(a)(2)(i)].

If the PHA proposes to deny assistance based on a criminal record or on sex offender registration information, the PHA must notify the household of the proposed action and must provide the subject of the record and the applicant a copy of the record and an opportunity to dispute the accuracy and relevance of the information prior to a denial of admission. [24 CFR 5.903(f) and 5.905(d)].

Comments: Director Black noted that changes were made to allow for recommendation from the board at last month's meeting. PIE tried to distinguish between the two looks backs. She reiterated that this has been fours' years of work. Ava will be leaving THA and this is her last meeting. Director Black wanted to acknowledge Ava's work on this. Chair Rumbaugh added his thanks. This has been something he wanted to do for years. "Starting over begins with housing," added Chair Rumbaugh. Director Black and her team has the board's thanks.

Commissioner Young motioned to approve the resolution. Commissioner Purter seconded the motion.

Upon roll call, the vote was as follows:

AYES: 4
NAYS: None
Abstain: None
Absent: 1

Motion Approved: May 26, 2021

Stanley Rumbaugh, Chair

9. COMMENTS FROM COMMISSIONERS

Director McCormick has been with THA for 36 years. She expressed her appreciation working with the board and ED Mirra. RED has been successful due to a good team, Cabinet, and line staff. Director McCormick expressed her heartfelt thanks to the board: “It has been an honor to work in Tacoma. Thank you for helping me go out on such a high note after 36 years in affordable housing.”

“It has been a great pleasure to participate in this work with Kathy,” stated Chair Rumbaugh. Commissioner Hodge echoed what Chair Rumbaugh stated. She is appreciative of Director McCormick. “We appreciate you and your team more than we can express. Enjoy your retirement”!

11. ADJOURNMENT

There being no further business to conduct, the meeting ended at 7:07 pm.

APPROVED AS CORRECT

Adopted: June 23, 2021

Stanley Rumbaugh, Chair



TACOMA HOUSING AUTHORITY

Real Estate Development Committee

Chair Stanley Rumbaugh
Commissioner Derek Young

Finance Committee

Commissioner Derek Young
Commissioner Minh-Anh Hodge

Community Partnerships Committee

Vice Chair Shennetta Smith
Commissioner Pastor Michael Purter

Education Committee

Vice Chair Shennetta Smith
Commissioner Minh-Anh Hodge

Diversity, Equity and Inclusion Committee

Vice Chair Shennetta Smith
Commissioner Minh-Anh Hodge



TACOMA HOUSING AUTHORITY

COMMENTS FROM THE EXECUTIVE DIRECTOR



TACOMA HOUSING AUTHORITY

To: THA Board of Commissioners
From: Michael Mirra, Executive Director
Date: June 17, 2021
Re: Executive Director's Monthly Report

This is my monthly report for June 2021. It supplements the departments' written reports. As the Board knows, I retire from THA on July 5th. That makes this my final report to the Board. I wish to leave the Board with two final expressions.

1. THA IS WELL EQUIPPED TO MAKE GOOD USE OF AN EXCITING FUTURE AND TO MEET ITS CHALLENGES

I wish to offer my view that THA's future and its opportunities are exciting and full of opportunities. THA will also face some notable challenges and choices. I write to offer some observations that may help the Board puzzle them out. I also wish to express my full confidence that THA has the four main assets it needs to make a very good use of that future:

- THA has a clear vision, mission, and values. That comes from the Board. THA has a strong understanding of these directives. Just as importantly, it has developed the language to convey that understanding to itself and to a wide variety of partners and communities who need to share that understanding if THA is to be effective.
- THA has strong finances.
- THA has strong community partnerships and support.
- THA has a strong Board and a very talented staff.

I offer these views in my attached memo to the Board. It is long. And it has some lengthy attachments. Much of this information may be unfamiliar to Commissioner Purter because he is new to the Board. I very much regret that my leaving deprives me of a better acquaintance with him. For the other Commissioners, this information will be more familiar. And they may recognize the attached documents. Even for them, the repetition can provide a useful emphasis to important topics.

2. MY THANKS TO THE BOARD

I also write to thank the Commissioners. You gave me the chance to serve as THA's Executive Director for 17 years, and for two years before that as General Counsel. That work has been among the most meaningful experience of my life. In my time at THA, THA's Board has been everything necessary to make THA the lively, innovative, effective, and mission-focused organization it is known to be. The Board is the author and authoritative repository for THA's vision, mission, and values. The Board provides the insistence that the work, and the people we serve, are important. The Commissioners have that inspiring and uncommon mix of qualities that the work requires: commitment to the mission, sophistication to understand and navigate the many puzzles and choices the work presents, an appetite for smart risk, a reassuring generosity in its support of staff, even when things do not go too well, and a never-failing good humor that gets us all over the

THA Board of Commissioners

June 17, 2021

Re: Executive Director's Monthly Board Report

Page 2

hard spots. The Board is a big reason why I can leave fully assured that THA is in very good hands. I am grateful to you for all of this. I am grateful for chance you gave me to share this hard work with you.

Thank you!



To: THA Board of Commissioners and THA's New Executive Director
cc: THA Cabinet; THA Staff
From: Michael Mirra
Date: June 17, 2021
Subject: My Final Memo to the Board

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ATTACHMENTS:

- THA's Statements of Vision, Mission and Values, and Strategic Objectives
- THA's Strategic Objectives Performance Measures
- THA Education Project and Its Elements
- THA's Real Estate Development 2002 – 2021
- THA Open and Future Projects List 2021-6-10
- THA's Uses of Funds Visualization 2018-2-7
- THA Project Management Tool Orientation Memo
- Sample Letters to THA from Clients and Partners

PREFACE

This is my last memo to the Board before I retire from THA on July 5th. I write to offer views on some opportunities, choices, and challenges ahead for THA. Much of this information may be new for Commissioner Purter because he is new to the Board. I regret that my leaving deprives me of a better acquaintance with him. For the other Commissioners, this information will be more familiar. And I refer to some attached documents that the Board will recognize. Repetition, however, can provide a useful emphasis to important topics. This information may also be useful to the person the Board chooses as THA's next Executive Director.

I begin, however, with the other reason I write. I write to thank the Commissioners. You gave me the chance to serve as THA's Executive Director for 17 years, and for two years before that as General Counsel. That work has been among the most meaningful experience of my life.

In my time at THA, THA's Board has been everything necessary to make THA the lively, innovative, effective, and mission-focused organization it is known to be. The Board is the author and authoritative repository for THA's vision, mission, and values. The Board provides the insistence that the work, and the people we serve, are important. The Commissioners have that inspiring and uncommon mix of qualities that the work requires: clear commitment to the mission, sophistication to understand and navigate through the many puzzles and choices the work presents to THA, an appetite for smart risk, a reassuring generosity in its support of staff, even when things do not go too well, and a never-failing good humor that gets us all over the hard spots. The Board is a big reason why I can leave fully assured that THA is in very good hands. I am grateful to you for all of this. I am grateful for chance you gave me to share this hard work with you.

I also feel reassured that THA's future will present some exciting opportunities. THA is well equipped to make a good use of this future. It has the three assets it will need:

- strong finances;
- strong community partnerships and support;
- a strong Board and a very talented staff.

That future will also present the Board with some choices and puzzles. I hope the observations in this memo will help the Board lead THA to reasonable answers and solutions.

"When I bring THA up in conversation, I usually describe it as, "probably the best housing authority in the country." And, I do mean that. Seeing your work changed my thoughts son what is possible through a PHA. Thank you for being a wonderful partner in our work, and thank you for the work your team does every day for our communities."

- Jamie Madden
Senior Director, Enterprise
Community Partners

[Email to THA, 2021-3-22]

1. THA's VISION, MISSION AND VALUES, its SEVEN STRATEGIC OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

I attach a copy of THA's Statements of Vision, Mission and Values, and its seven strategic objectives. A long while ago, the staff wrote the initial draft of these directives. The Board edited them and adopted them. They have gone through successive revisions. These directives are foundational. Everything else at THA is downstream from them. Below I recount how. These statements have served us very well to imagine our work, recruit talented staff, elicit partnerships, and find the financing. Below I also note the further attention they require.

1.1 The Strategic Understanding of THA's Job

The Board's Statements of Vision, Mission, and Values have given us the language to explain to ourselves how we understand THA's job. This understanding helps us insist on its importance. It helps us show what that understanding looks like in programs that serve. As important, these directives have effectively explained our work to the many community partners and funders we need to do this work right. The Board and staff need to be fluent in this explanation.

Everyone has their own way to explain THA's work. Here is the way I have explained it to prospective staff, new staff, and community partners and funders, prospective and real. I have found this language effective in eliciting the interest and support we need:

The guts of THA's work is to provide high quality and affordable housing to people in need, with a focus on the neediest. We do that in three main ways.

First, we help people pay the rent to private landlords on the private rental market. We do that through our various rental assistance programs. Tenant-based rental assistance is the nation's largest program to house people of low income. Yet, it is struggling in Tacoma's market, one of the most expensive in the

Dear Tacoma Housing

I am writing this letter to thank you for helping me and my children years ago by providing us with a safe place to live.

When I came to see Lesley (the social worker who helped me) I had just left an abusive marriage and had no options. I will never forget the feeling I had on the very first day I moved in. It was one of the best days of my life. There's no way I could've had the opportunity of a warm, nice home if it weren't for you and all the kind social workers who helped me during the years I lived there. . . . Because of the services you provide, my 2 children and I always had a safe, cozy, loving home to be a family. . . . I finished the education I began while living in Tacoma Housing and have served as a Public School Teacher for 11 years now. I would not have been able to accomplish self sufficiency if it weren't for the help + relief you provided.

I want you to know that the work you do saves lives + protects children. It takes a truly kind, caring + compassionate person to do your job. Thank you for always treating me with compassion patience, and love.

The people who work for Tacoma Housing truly saved my life + my children's as well.

- Carly B. [Email to THA, 2018-8-20]

nation. Our housing vouchers have trouble keeping up with rising rents, And when vacancy rates are so low, our clients do not compete well with others with better rental, credit, or criminal history. Also, tenant-based vouchers do not add a square inch of housing to the market.

*The shortcomings in the rental assistance programs put a premium on the **second** way THA houses people. THA is a real estate developer. It builds, buys, and rebuilds property that it then rents. THA is the city's largest residential landlord.*

In addition to housing people, THA's real estate development work has four companion goals.

- *THA's real estate development brings investment dollars to neighborhoods that need the investment. We do a good job and in that way embolden other people to invest in those neighborhoods. Salishan is one of the nation's biggest examples of this effect. It is a \$300 million investment that recouped decades of public and private underinvestment on the Eastside.*
- *THA also seeks to bring its housing to neighborhoods that do not need the investment. What they need is the racial and economic integration THA's housing can bring to neighborhoods and neighborhood schools.*
- *THA also understands its real estate development to be a necessary part of community development. This means several things. It means that THA consults residents for their vision of their neighborhood and how THA's work can further that vision. That consultation can strengthen a neighborhood and allow residents to see their fingerprints on the planning. This shows, for example, in our planning for Housing Hilltop and James Center North. Community development means that THA seeks to provide not only affordable housing but also affordable retail space for local businesses. Community development means that when THA spends construction dollars, it seeks to engage firms owned by persons of color and women, and small firms. It means that THA seeks to direct the jobs created by the work to THA clients and to persons of low-income in Tacoma.*
- *THA also understands its responsibility to help our city grow into the higher densities that the city's Comprehensive Plan directs. These higher densities can concern people. The concerns can be wide ranging. THA understands some of those concerns as a design challenge. Accordingly, THA must show that the higher densities can look lovely.*

*The **third** way THA houses people is by helping other organizations, nonprofit and for-profit, to finance and develop their housing for low income persons. Sometimes we provide the land. Sometimes we issue conduit bonds.*

Sometimes we are the developer. Most of the time, we sign long-term contracts promising to pay fair market rents into the property in exchange for the owner's agreement to set aside units for THA's clients at rents affordable to their incomes. We do this by project-basing Section 8 vouchers or by offering a THA invention – property-based subsidy. I think of this housing as THA's shadow portfolio. We don't own it. We don't manage it. Instead, we help to develop and finance it. That portfolio is presently over 1,000 units, and growing.

All this work housing people is the preoccupation of the Tacoma Housing Authority. It is hard work. Yet, we do not consider it the harder part of the job. The world knows how to do this work when it wants to house people in need. It does not want to very often, but when it does it know how to finance housing, design it, build it, and manage it. It knows how to design and run rental assistance programs.

The world does not know nearly as much about the next part of what the Board's strategic directives require of THA: how to spend those housing dollars, not only to house people in need but also, at the same time, get two other things done.

(1) help them succeed, not just as tenants, but also as the mission statement contemplates, as "parents, students, wage earners and builders of assets". We want their time with us to be transforming in this way, and, if they can work, temporary. We want this surely for grown-ups. We want it emphatically for children and young people because we do not wish them to need our housing when they grow up. This explains THA's large investments in its educational partnerships and in its client support services.

(2) help our communities succeed, and when they do they do so equitably, with a shared prosperity. THA seeks to help its communities be what its mission statements envision them to be: "attractive places to live, work, attend school, shop, and play" and places that everyone can experience that are "safe, vibrant, prosperous, attractive, and just".

A mission understood this way makes THA more than a real estate developer, more than a landlord, more than a provider of rental assistance. It makes us what we try to be: a social justice agency with a technical mission.

Yet the world does not quite know how to do this expanded part of THA's mission. What I so admire about THA, its Board, its staff, and our many partners, is their effort to find it out. When it works it is a good use of a housing dollar.

This language has served as a good recounting of the Board's strategic directives. It has helped to explain THA to ourselves and our communities.

1.2 The Strategic Directives Need Some Further Attention as Time Allows

We have periodically reviewed and refreshed the Board's Statements of Vision, Mission and Values, and the strategic objectives. The last time was in 2013 and 2016. In 2016, the Board adopted performances for each of the strategic objectives and strategies. I attach a copy. The next step would have been the Board's choice of targets for those performance measures. Yet we decided to await our new software and what we had hoped will be its ability to digitally track and report on the performance measures. As the Board knows, that software conversion remains incomplete. And so the discussion on performance measures stalled.

Here is where we are in this important effort:



What the Board Chooses:	Status
THA's Statement of Vision	Done
THA Mission Statement	Done
Strategic Objectives	Done
Performance Measures for each strategic objective	Done
Performance Targets	Not Done
What the Staff Chooses	Status
Strategies to try to attain each strategic objective	Done
Performance measures for each strategy	Not Done
Projects, with performance measures	Ongoing
Job objectives	Ongoing

At the Board's Annual Meeting in August 2019, I noted how this strategic discussion stalled while we await the software. I offered the view that the Board's strategic direction to date nevertheless provides the staff with adequate guidance, that their choices are well in line with the Board's direction, and that Board- staff are communicating adequately about those choices and results. I noted that we could continue to delay the strategic discussion, but only if the Board had adequate confidence that this was true. At that meeting, the Board expressed that it did have that confidence. The minutes of that part of the meeting conveyed the Board's confidence:

Executive Director (ED) Michael Mirra directed the board to his report. ED Mirra's report shows the progress of THA's Strategic Planning, which was approved by the board in 2016. The project stalled primarily due to the software conversion project to OpenDoor. ED Mirra offered his view that the Board's strategic direction thus far is clear and that THA staff adequately understand it and are making choices aligned with the Board's direction. He asked if the Board feels the same confidence to allow us to continue to delay resumption of the strategic discussions, which staff do not have time to do. Vice Chair Rumbaugh stated that staff has risen to the occasion time after time and repeated what he has said before, "We have the most efficient agency in the city and the best housing authority in the country." He believes staff share the board's world view. Chair Young noted that everyone is looking at what is being done based on THA's mission, vision and values and strategic objectives. Further planning would just

add the less important detail. Commissioner Banks agreed that staff has risen to the occasion every time. The rest of the board concurred. On behalf of the staff, ED Mirra thanked the board for their vote of confidence, which he said is very meaningful.

[THA Board Minutes 2019-8-28]

If the Board continues to have this adequate measure of confidence, I judge that it can continue to delay the resumption of the strategic discussion until staff have the time for it and until the software is ready to be helpful. I note that THA is about to decide on how to proceed with its software conversion. That decision will clarify when the software will be ready to track the performance measures and targets. Once the software is in place the strategic discussion and their implementation should become a lot easier. The discussion should also await the Board's appointment of the next Executive Director and for her or him to appoint the next Directors of Real Estate Development and Finance.

2. SOME CHOICES, OPPORTUNITIES AND CHALLENGES AHEAD FOR THA

In this section, I note some of the choices, opportunities, and challenges THA will likely face in the next few years. I sort them by THA's seven strategic objectives.

2.1 Housing and Supportive Services

THA will provide high quality housing, rental assistance, and supportive services. Its supportive services will help people succeed as tenants, parents, students, wage earners and builders of assets who can live without assistance. It will focus this assistance to meet the greatest need.

THA houses or pays to house low-income households in two main ways. Its main way, measured by dollars spent and people served, is its rental assistance that helps them pay rent to private landlords on the private rental market. Those programs are the nation's largest source of affordable housing dollars. They are intended to allow people to choose their own neighborhood, school, and address. In this way, the programs seek to promote racial and economic integration of the private rental market. The programs do have that effect. But the effect is limited in a tight market like Tacoma's. This places an added importance on the second way THA houses people. THA builds, buys, rebuilds, or finances hard units that are set aside for low-income households. (That work is the subject of its own strategic objective.) Each of these strategies presents some choices and challenges. I review some of them below.

2.1.1 Time Limits on Tenant-Based Rental Assistance

As the Board knows, THA has imposed a 5-year time limit on new admittees to its mainline rental assistance program, the Housing Opportunity Program (HOP). The time limits apply only to persons who are able to work. It does not apply to seniors or persons with disabilities. THA offers two types of extensions to the time limit. It can extend the assistance if a household experiences an emergency, such as a loss of income or illness. That can extend the

assistance for another several months. Also, THA will extend the assistance for another full year if the person enrolls in an educational or training program. THA also imposes a three-year limit on participants in the College Housing Assistance Program (CHAP). This limit extends the CHAP assistance through a two-year community college program, plus a transitional year afterward.

THA has suspended these time limits during the COVIF-19 pandemic. This temporary extension recognizes the hardship resulting from the pandemic and the related economic hardship. As the pandemic lifts, however, staff will review for recommendation to the Board whether to resume the time limits, or to eliminate them and end this signature attribute of HOP and CHAP. This is a question only the Board can answer. To help answer the question, the Board should recall its reasons for imposing the time limits in the first place. Two reasons stand out:

- Time Limits to Spur People to Strive: There is some basis to think that a five-year time limit helps people to strive. It gives them a deadline by which they should increase their earned income to be more ready for the private rental market. As part of the program, THA offers enhanced supportive services to help them do that.

The outcomes of the HOP experience have not fully justified this expectation. While average HOP incomes have increased quite a lot (about 45%) the increase is not enough to keep up with Tacoma's rising rental market. Most HOP households have incomes upon their departure from the program that would leave them rent burdened. Also, very few HOP families accepted THA's office of enhanced supportive services. That brings us to the **second** reason for time limits.

- Time Limits to Give Others a Turn at Receiving the Assistance: This second reason for time limits has nothing to do with expectation about increasing income. Instead, it seeks to address a problem at THA. The problem recognizes that the people receiving THA's rental assistance are the lucky ones.

Before THA imposed time limits, these lucky clients received the golden ticket of a deep permanent subsidy that, as long as they remained eligible, could last a lifetime. Meanwhile, tens of thousands of people are left on the outside looking in. They cannot even get on our waiting list. THA has no way to explain who is in and who is out by any factor that should matter. The two groups are the same by need, race, language, ethnicity, national origin, family composition, age, and ability and disability.

Hello, my name is S███████████, I have just been notified that I was selected to be added to the HOP waiting list. I would like to extend my thanks, appreciation, and gratefulness to this good news. I do understand that there is still a possibility that I may not receive a voucher when my number comes up, but all I can do is keep it in prayer n hope that my family and I are eligible for this very needed assistance. Meanwhile I am still trying to make a stronger more stable future for my family by furthering my education and hopefully find work that can works with my schedule. Again thank you for the notification as well as the opportunity to give my son a good home.

Sincerely,

S███████████

[Email to THA, 2013-7-16]

Only two factors distinguish the two groups, and both of them are troublesome: the first factor is the luck to win the THA lottery and get placed on the waiting list, the second factor is savvy to navigate even the application process. A time limit acknowledges the peasant truth that at some point it is someone else's turn. The question and answer are probably not fancier than that.

Imposing time limits meant that THA faced that hard day when that mother of two children reached the end of her five-year time limit, whether or not she was ready for the private rental market. It tested THA's resolve to end that mother's assistance. Perhaps we gave her a three month or a one-year extension. But at some point THA did end her assistance whether or not she was ready. We did it for the good reasons I mention above, but they are not reasons to celebrate. We ended her assistance because, in the market we face, and the enormous unmet need, we knew that a mother just like her was waiting her turn.

THA has a lot of community support for imposing time limits.

2.1.2 Fixed Subsidies for Tenant-Based Rental Assistance

The other distinguishing feature of HOP is its fixed subsidy. In other THA programs, and most rental assistance programs in the nation, the value of the subsidy depends on the household's income. The lower the household income the greater the subsidy. The greater the income the lower the subsidy. This means that a family that increased its income lost part of that increase by a reduction in the rental subsidy and a corresponding increase in its share of the rent. In this way, it acts as a disincentive to increased earnings. With HOP, we offered a subsidy amount fixed at 50% of the payment standard for the size of family. We do not change that amount as the family's income goes up or down.

The fixed subsidy does impose some burdens on client families. On average, it is lower in amount than the income-based subsidy. Also, the slightly lower subsidy means that lower income families can struggle in Tacoma's tight rental market even with the subsidy. When the pandemic is over, the staff will likely present to the Board a recommendation on whether to continue the fixed subsidy or revert back to an income-based program. (Eliminating the time limit and the fixed subsidy will effectively end the HOP program.)

To help the Board determine whether to keep or eliminate the fixed subsidy, it should recall its reasons for adopting it in the first place. It serves five purposes.

- Fixed Subsidies Eliminate the Disincentive to Work and Replace It with an Incentive To Work: The fixed subsidy eliminates the disincentive to work that otherwise arises from an income-based subsidy. With fixed subsidies, a family that increases its income keeps the whole increase. This turns the subsidy from a disincentive to an incentive to work.
- Fixed Subsidies are Simpler to Explain and Market: A fixed subsidy is much simpler to explain to clients and landlords than the income-based formula. This simplicity can be an advantage in eliciting the willingness of landlords to participate.

- **Fixed Subsidies are Less Nosy into Client Lives:** With a fixed subsidy, THA does not have to be so nosy into the business of the client family. We do not have to keep track of its changes in income, medical expenses, or family composition.

- **Fixed Subsidies are Easier to Administer:**

A fixed subsidy is easier to administer. For example, it requires no change of circumstance reporting or rent adjustment to account for changes in income. This is less paper shuffling for THA, the client, and the landlord.

- **Fixed Subsidies “Thins the Soup” to Serve More Families:**

On average, the fixed subsidy is smaller than the subsidy in the income-based program. This saving allows THA to serve more families. This was particularly important at the time we adopted HOP. At that time, we faced serious Congressional budget cuts. In response, most PHAs around the country stopped issuing vouchers. Some PHAs cut people off the program. The THA Board had no appetite for either strategy.

Instead, THA invented the HOP program because its offered savings that came with the lower subsidy. Commissioner Rumbaugh referred to this as “thinning the soup”. Rather than take chairs away from the dinner table, THA kept everyone at the table as a family would with a slightly thinner soup. While other PHAs were freezing or cutting vouchers, those HOP savings allowed THA to issue more than a hundred additional vouchers.

As an alternative to ending the fixed subsidy the Board can address any resulting rent burden by increasing its value. Doing that will also preserve the advantages of continuing to use a fixed subsidy.

2.1.3 The Value of Project-Basing Rental Assistance

Instead, of issuing a housing voucher to a client household who would then hunt for a landlord to rent from (“tenant-based assistance”), THA can also “project-base” its assistance. By contract with a property owner, THA obliges the owner to rent that unit to a qualified low-income household. The contract then obliges THA to subsidize the rents to levels affordable to the household. There are two main ways to do this. The **first** way is to project-base a Section 8 housing voucher. This is a common strategy among housing authorities. THA has been very successful in doing this with non-profit owners. It has not been successful eliciting interest from

“As many of you know I was part of the Maintenance staff for a little over seven years. . . . I have been doing HQS inspection’s for over a year and a half now, and have had the chance to see other property management company’s maintenance’s work. . . . [O]ur maintenance Turn Team is top notch and one of the best out there. Their attention to detail is high caliber. I have 40 years of Maintenance and construction experience, so I can say this with much confidence. I find it hard to find any problems with the work in our units that the Turn Team does.

“Also I would like to express my appreciation of being part of the THA family. I couldn’t ask for a better organization to finish out my working career. I believe that what we do is a noble cause. And the feeling that this organization’s genuine caring for its employees is amazing. And the way everyone goes to bat for our clients, and has each other’s backs is also amazing. So THANK YOU Maintenance, and everyone else that is apart of this great THA family.

Thanks Again”

- Steve Hinote
THA HQS Inspector

for-profit owners. To make the arrangement more enticing to for-profit owners, THA invented a **second** way to do this: “property-based” subsidy. It is similar to Section 8 project basing, except it eliminates the contract between THA and the tenant. This makes it simpler to market and to administer.

Project basing serves the main purpose of housing low-income households. It also offers several other advantages that make it a particularly good use of a housing dollar:

- Project Basing Finances New Construction or Rehabilitation: A tenant-based voucher does not add any housing to the market. In contrast, THA’s long-term project-based commitment can support construction debt to build or rebuild housing. This is how THA has financed many of its own construction projects. It is how THA has helped to finance many construction projects by other organizations. *E.g.* Mercy Housing’s New Tacoma Apartments; HarborView Manor, Eliza McCabe, and Hillside Gardens;
- Project Basing Matches THA Housing Dollars with Supportive Services: Project basing housing with nonprofit developers is a good way to match THA’s housing dollars with specialized supportive servicers that THA does not provide, does not know how to provide, and does not want to learn. *E.g.*, Catholic Community Services’ New Nativity House for chronically homeless adults; YWCA’s Home at Last Apartments for families fleeing domestic violence.
- Project Basing Strengthens Non-Profit Partners: Project basing also strengthens THA’s nonprofit partners. That, too, is important.

2.1.4 *The Value of THA’s Portfolio of Portfolio*

The other main way THA houses people is by being their landlord. THA’s portfolio of housing for this purpose is very valuable. It has a very large insured value. It is also critical to THA’s mission, in several ways:

- The Portfolio Works When Housing Vouchers Don’t: THA’s portfolio houses people in one of the nation’s tightest rental markets that is

“Hello,
Since I have been able to join the Housing Program my life has changed. When I was accepted. I was currently homeless and staying in a shelter with three children. Really just trying to get back on my feet. Since we have been able to get a home. Our whole life completely changes. From us struggling to now being able to provide children with some stability. Their Academics started to get a lot better. My oldest daughter went from reading at 1st grade level for reading, to 5 grade. She also got a Most Improved award this year. To walking out of the 5th grade feeling confident and believing in her self again. My middle daughter went from not know willing or wanting to learn. Not knowing how to do adding and subtracting, to being able to do it now. To be excited bout learning, I am blessing that I received Housing alone!! Along the way got meet some petty nice people. Every case worker I have ever had, as been nothing but understanding and helpful. This program is very helpful, in more ways then one! Financially I am able to do so much more. Being able to pay rent, cable, lights, cell phone, and everything else, with no worries. Is the best feeling in the world, which now I am able to follow my own dreams. Currently a full time student, going for my ECE(Early Childhood Education). Hopefully in two years ill be able to have my own daycare center. Work full time at a daycare center, i love it. Came to see that children are my passion.

Thank you sooooo mcuh

J [REDACTED]

[Email to THA, 2019-6-26]

not congenial to vouchers. The portfolio is how THA houses its neediest households who, because of race, parental status, language, or disability, would find the private market unwelcoming even if they had a voucher. The portfolio works for these purposes because THA's ownership removes it from the speculative rental market and assures that it is permanently affordable and accessible to THA clients. The portfolio works in this way also because THA is a very good landlord to its diverse population of clients.

- The Portfolio is How THA's Invests in Neighborhoods: The portfolio – building it, buying it, and maintaining it - is how THA invests in neighborhoods that need the investment.
- The Portfolio is How THA Brings Racial and Economic Diversity to Neighborhoods: THA can contribute racial and economic diversification to a neighborhood by owning the housing in those neighborhoods.

2.1.5 The Value of Supportive Services

In the world of public housing authorities and housers generally, there are two views of supportive services. By one view, they are a sideshow. They are interesting, but they are something that other people provide. If THA had this view, we would think of ourselves primarily as real estate developers, landlords, and providers of rental assistance.

THA has a very different view of supportive services. This is why we created the Department of Client Support and Empowerment and its predecessors. According to this view, supportive services are a necessary companion to the housing we provide. Their necessity is evident if you consider who we house, and why. Three reasons stand out.

- Supportive Services Help Clients Succeed as Tenants: THA houses many households who need to help to succeed as tenants, and for THA to succeed as their landlord. They may be seniors aging in place or a person with disabilities who needs help to live independently. They may be a household coming from trauma. The common ones are domestic violence, addictive behaviors, or homelessness. They need help to stabilize. Services make their stabilizing a lot more likely.

Or a household may be headed for eviction for other reasons. It may have a parent who does not know how to keep house. Perhaps she has lost control of her children. She may have a jerk of a boyfriend. Or she may be the neighbor from hell. In any case, life is too short to ask the neighbors or the staff to tolerate that for long. THA would consider evicting her. But an eviction is a failure for not only the mother but also for THA. An eviction is also very expensive for both. In those instances, THA's property manager can call in the THA caseworker. The caseworker can intervene to try and save the mother by arranging for services, or in other ways, try to convince the property manager to give the mother another chance.

In all these ways, supportive services can help clients succeed as tenants and help THA succeed as landlord. Supportive services then are a necessary tool in the property management toolkit and a measure of THA's high standards of stewardship.

- Supportive Services to Help Clients Prosper: By its mission statement, THA also seeks to help clients succeed, not just as tenants, but also as “parents, students, wage earners, and builders of assets”. Supportive services do this as well. THA’s Education Project is part of this work. *See below.*

2.1.6 *Need for Expanded Supportive Services*

THA may face a need to expand its supportive services for two reasons:

- Our Present Housing Clients Need

More Support: THA’s clients need more supportive services, in at least two ways. **First**, we need to extend our services to our voucher clients. Our services have focused on our clients who are tenants living in THA housing. Our service reach into our voucher population has been more limited. That population has the same needs. It is also a much larger population. But it is harder to serve since the clients are scattered throughout the city and we do not have the same close connection that comes from being a landlord. **Second**, all our clients, whether tenants or voucher holders, need more support.

- THA May Need to Back Fill Services its Partners Cannot Provide: Our clients participating in the College Housing Assistance Program (CHAP) and other specialized housing programs need supportive services. We have designed CHAP to rely on supportive services from T.C.C. and UW- Tacoma. We had hoped that, in these programs, THA’s role would primarily be the source of the housing dollar, not services. Yet those partners have not been equipped to provide the necessary supportive services. This has been a notable weakness in the program implementation. I do not know if these partners can acquire a greater capacity to do this work. If not, THA should consider providing those services.

2.1.7 *Supportive Service Performance Measures*

A challenge with supportive services and other “soft services” is measuring what THA achieves for a dollar spent on providing them. The attached draft of performance measures shows that the Board has chosen measures that align with its mission statement. For example, these measures would have us track the number of evictions avoided and the money saved as a result, the educational attainments and income progression of clients, their asset building, and quality of life indicators. Thus far, however, our monthly Board report conveys mainly “inputs”, such as number of clients “engaged”, number of referrals, or meetings held. These are not the “outcomes” that matter and that the Board has sought to track. Part of the difficulty in tracking outcomes has been the limitations on our software’s ability to track and report the pertinent data. I hope our continued software investments will solve that problem.

““WOW. I am so grateful. I am rarely speechless, but this is one of those occasions. I have so many wonderful examples of strong work ethic, and problem solving around me. Tacoma Housing Authority is a great place to work, and a beacon in the community. Telling people where I work is like bragging. I love it. Leadership in this agency is outstanding and it drizzles down to me.”

- THA Staff on occasion of the Board’s grant of Special Recognition Award

[Email to THA, 2021-2-1]

The solution will also emerge from the strategic planning underway at the Department of Client Support and Empowerment (CSE). That planning will review what THA should hope to accomplish by its supportive services and what the performance measures should be.

Even without clear data driven metrics, I also hope the Board has enough confidence in its own judgment about the worth of supportive services. Supportive services have a value that will not show in data. When a shooting or other tragedy occurs in the neighborhood, it is our case workers who go door to door to inquire and reassure. During the pandemic it was our case workers who checked in with our clients, distributed masks, sidewalk chalk, bubbles, and reassurance. They organized the vaccine clinics at all our properties. More generally, it is our case workers doing the hard job to understand each client as an individual with goals and needs, whether or not they fit into the rules of a HUD-designed program. The best way to explain this value is to refer you to the attached emails and letters from clients. I hope that the Board will continue to credit these voices of our clients when judging the value of our supportive services.

2.1.8 THA's Education Project

THA's Education Project has become one of its signature initiatives. It has brought THA local, state, and national renown. It helps to account for THA's strong community standing and funding success. More important than all this, the Education Project provides transformational assistance to clients and to educational partners. For these reasons, the Board needs a detailed appreciation for the project's purpose. That appreciation will allow the Board to assess, and I hope support, the initiatives of the Education Project.

"I'm writing this email because I wanted to let you all know how important this college housing assistance program was for me personally. I started going back to school when I was 25 and there were a lot of obstacles along the way including me breaking my leg and having multiple surgeries which in some cases cause me to have to leave school for a while. In addition to that I'm a single mom and I had twins at age 20. But I kept moving forward. I was able to work full-time while I was taking my prerequisites because they were online classes. I had another child right in the middle of my last prerequisite class. Once I finally got into TCC nursing program I was no longer able to work full time due to the demands of the program. I still had to work and found myself single again with very little help or support. I cleaned houses, did in home care for the elderly, and worked as a process server in my spare time from school but was not making enough to live on. I became homeless during the program and had to live in one bedroom at my mom's with 6 other people.. with all three of my kids ages 12,12 and 4. This was an extremely difficult time emotionally and financially trying to fulfill my obligations to the program, save money and care for my kids alone. I thought it would break me. This program was a godsend... being able to have my own little safe space without other people invading my space or interfering. I was able to successfully finish the Registered Nurse program at TCC and I am scheduled to take my state boards for my nursing license. I will soon be making enough money to support my family. I don't know if I'd have gotten through all of that without a little help, and now I get to have a fulfilling career caring for others and rest easy knowing my own family will be stable. Thank you so much for this opportunity. I'll be starting my bachelor's degree program in nursing next year and have goals even beyond that because of a renewed confidence in myself for finishing this extremely challenging RN program. Please keep doing what you're doing, there are others out there like me."

T [REDACTED]
Graduate Registered Nurse.
[Email to THA, 2018-9-26]

The purposes of THA's Education Project fit firmly inside THA's understanding of its vision, mission, and values. The Education Project seeks ways to spend a housing dollar not only to house needy people, but also to further two other purposes: to help them and their children succeed in school; to help public schools and colleges educate low-income students.

When THA began its Education Project around 2006, it found itself in many community discussions about education. In those discussions it had to explain why a public housing authority was present. Indeed, we needed some time to explain that to ourselves. Other than a general understanding of the relationship between housing and school success, we had to grow into our own explanation. We did not have too many templates to guide us. Since then, many other PHAs have ventured into this area and helped to mature that explanation. THA was a leader from the start.

We can now easily explain why THA is and must be interested in education. Three reasons stand out:

- THA Promotes Education to Help People Succeed: THA's mission is to help people succeed, not just as tenants, but also as "parents, students, wage earners and builders of assets." This type of success requires success in school for both parents and their children.
- THA Promotes Education to Help Tacoma Succeed: School success is also necessary for the other part of THA's mission: to help communities be "attractive places to live, work, attend school, shop and play" and to "help its city be "safe, vibrant, prosperous, attractive, and just."
- THA Has a Duty to Assist Public Schools and Colleges: The Tacoma area has good public schools and colleges. Yet, they all struggle with alarming extents of homelessness among their enrolled student population. None of them, however, are equipped to address these housing needs. That is THA's job. These schools and colleges have a claim on THA's help.

THA is indeed situated to have an influence on school outcomes. This influence arises from four facts. These facts are likely true in most cities. They are surely true in Tacoma:

- Except for the school district and public assistance and child welfare agencies, THA serves more low-income children than any other organization in Tacoma. It houses about 1 of 7 Tacoma public school students and about 1 of 4.5 low-income students.
- In serving families, THA is deep into their lives, as landlord, provider of very valuable housing assistance, and provider of supportive services. This gives THA an influence over their behavior and choices.
- THA owns large communities that can be staging grounds for educational initiatives.
- THA resources can lever reforms and investments from school districts and others.

The Education Project is an elaborate and elaborating partnership with the Tacoma Public Schools and the area's public colleges and technical schools. It has had more than 12 initiatives. I attach a description of the project, and those initiatives. I recommend the Project to the Board.

2.2 Housing and Real Estate Development

THA will efficiently develop housing and properties that serve primarily families and individuals unable to find the affordable and supportive housing they need. Its work will promote the community's development. Its properties will be financially sustainable, environmentally innovative, and attractive.

2.2.1 The Importance of THA's Real Estate Development

Real estate development is critical to THA's mission in several ways. Here are the main ones:

- Real Estate Development Grows THA: The construction and purchase of property is how THA has grown, in two ways. It allows us to serve more people. It makes money that funds THA's activities.

- Real Estate Development is a Necessary Response to Tacoma's Tight Rental Market: Real estate development is THA's main response to an increasingly unaffordable rental market that is less and less congenial to tenant-based rental assistance. A tenant-based housing voucher does not add a square inch of housing to the market. In contrast, building does add housing. More important, by building new housing or buying it, THA removes the housing from the speculative rental market. This assures that it is available and accessible to low-income persons and that it remains so for a long time. In a market like Tacoma's, doing this should remain a primary THA function.

- Real Estate Development to Serve the Neediest: THA's portfolio of housing that it owns and manages is necessary to serve the neediest households. These are households whom the private

Michael-

I just wanted to take the opportunity to let you know what a pleasure it has been to work with you and your team on the Salishan project. We have been a part of so many projects over the years but rarely experience the collaboration and dedication that your organization exhibits daily. I know in my conversations with Rhuel Reedy weekly that he and Tina worked through numerous challenges and difficulties throughout the project and did so amicably and always in the best interest of the project and both parties.

I still remember our conversations prior to the start of the project and your statements regarding the integrity of your organization. I want you to know that these principles were implemented and practiced by your entire team throughout the project. As I'm sure you know; it is very rare to conduct business with any entity in which the culture is consistent throughout the entire organization.

Gary Merlino Construction is very proud to be a part of your team and associated with such a special project.

- Charlie Oliver
Gary Merlino Construction

[Email to THA, 2009-4-21]

rental market does not serve well even if they have a housing voucher. These households face barriers or discriminatory exclusion because of rental, credit or criminal history, race, language, parental status, or disability. In contrast to the private rental market, THA is a welcoming and congenial landlord.

- Real Estate Development is Necessary for THA's Equity Work: The tenant-based rental assistance is an important way to racially and economically integrate the housing market. It is supposed to allow families the freedom to choose their own housing and, in that way, spread through the neighborhoods. While this must remain an important goal, it has limited success in neighborhoods that are unaffordable, even to households with a voucher, or that in other ways are inhospitable, especially to households traditionally excluded because of race, language, parental status, or disability. Another way to promote this integration is for THA to buy or build housing in these neighborhoods.
- Real Estate Development as Community Building and Economic Development: Real estate development is how THA builds a community and strengthens its economic development. It can have this effect in several ways. (1) When THA proposes to build, it convenes neighborhood voices to guide the work. This can become an occasion for the community to recognize and exercise its own agency, and get stronger; (2) Real estate development is how THA brings investment dollars to neighborhoods that need it. THA does a good job doing that and, in that turn, emboldens other people to invest in those neighborhoods; (3) When THA builds, it considers not only what it is building, and why. It also considers how to do it in a way to make the community stronger. This is often called “spending a dollar twice”. We spend a dollar the first time to get the material and services it buys. We get its value a second time in how we spend it to strengthen the community. That happens when THA contracts with firms owned by persons of color or by women. It also happens when THA directs the jobs created by the construction to its clients and to other low-income persons in Tacoma. THA also seeks to “buy local”.

2.2.2 The Importance of Purchasing Existing Housing

Much of THA’s real estate development work has it build new housing. This will always be an essential part of the work. Building new adds new units to the market. Building new is also how THA can invest dollars in a neighborhood and in a workforce. Building new gives THA control over design. Yet, building new is also very expensive. And it takes a long time.

For these reasons, buying existing housing must also be a prominent strategy for THA. Buying serves several purposes.

- Buying is Less Expensive Than Building: Buying housing is much less expensive than new construction. It costs THA more than \$300,000 per unit to build new. It can buy an existing apartment complex for \$125,000 per unit. Even if THA would then have to spend \$25,000 per unit for repairs, it is still much less expensive.
- Buying is Faster: Buying property is much faster than new construction.

- Buying Can Help a Neighborhood and Tenants: Buying property is another way for THA to help a neighborhood. If a property is poorly managed or if its owner cannot invest what the property needs for upkeep, a THA purchase can help.
- Buying Can Make THA Money: Buying properties can make THA money in either its rental stream or its investment value.
- THA Can Compete for These Purchases: THA can compete for purchasing property. As a public purchaser, it can offer sellers important tax advantages not available from private or speculative purchasers. THA presently also has some ready cash to use for the purpose.

These reasons to buy property provide a list of four attributes of a property that would make it interesting for THA to purchase. The more of these attributes a property has, the more likely THA will buy the property:

- Purchasing the Property Will Preserve its Affordability: A THA purchase can preserve the property's affordability to low-income households. The property may have an expiring affordability requirement, or its rents may be increasing from the natural rise of the rental market. As owner, THA will moderate rent increases.
- Purchasing a Distressed Property Will Help the Neighborhood and the Tenants: A property may be in poor shape because the owner cannot or will not invest what it needs for maintenance. The property may be poorly managed. A THA purchase can help the neighborhood and the tenants by assuring the necessary investment and very good management.
- Purchasing a Property Can Strengthen Community Partnerships: THA will buy property to strengthen community partnerships. For example, THA bought James Center North, a 7-acre mall that will allow the development of 500 to 700 apartments, plus retail and community space. One reason for this purchase is its location. It is across the street from the Tacoma Community College campus. Some of those units will be a valuable addition to THA's College Housing Assistance Program (CHAP).
- Purchase Property to Make Money: THA will buy property to make money, from the rental stream or the investment value, or both. This money will help subsidize THA's housing and operations.

2.2.3 The Urgency of THA's Real Estate Development

This is an urgent time for THA to build or buy as much housing as possible. It is urgent for at least these three reasons.

- The Need for THA's Housing is Greater Than Ever: Much of this urgency arises from Tacoma's "new" rental market. It is one of the most expensive in the nation. We can see that large parts of the city are on such a trajectory that the only notable measure of affordable housing in them, and the only notable measure of racial and economic integration in them and

their local schools, will come from the housing that THA and its partners manage to own, buy, or build in the next few years.

- Stressed Properties for Sale: The pandemic and the related economic slowdown has been stressful for many multi-family properties. Some of them may be for sale at good prices. Real estate media report that large real estate investment funds with ready cash are seeking bargain purchases. This may be a replay of what happened during the Great Recession when much of the nation's rental portfolio passed into speculative and corporate ownership. THA should get to these purchases first.
- THA has Access to Unprecedented Levels of Financing, for Now: THA will likely have access to funding and financing in amounts not seen for several generations. Federal, state, and local governments, and philanthropy, have new funding sources for affordable housing development and purchase. THA also has healthy amounts of its own money available for the purpose. THA's financing in these amounts will not likely last too long. THA needs to buy and build now.

Building or buying properties does entail risk. Let these reasons for urgency factor into the risk assessment.

This same urgency oddly impels THA also to plan long term and to have a capacity not only for risk but also for patience. It should be willing to buy land for future development even though the development may be way off in the future. If THA delayed its purchase of land until it was ready to build, it would miss many opportunities.

2.2.4 THA's Faircloth Public Housing Units

THA has converted most of its public housing portfolio to Project-Based Section 8 Units. It did that using HUD's Rental Assistance Demonstration Project (RAD). THA did that because it judged that Congress will not adequately fund public housing in the present expansion of the universe. THA also judged that the Section 8 financing will continue to be more stable.

However, under HUD's rules, THA still has access to financing for more public housing units. These units are on HUD's "shelf" waiting for THA to call upon them. These are called Faircloth units. THA can draw down **714** Faircloth public housing units. This public housing financing is very valuable. While it is still not enough to sustain a portfolio, it is better than a unit without financing. Importantly, HUD's rules also permit THA, once THA creates a Faircloth public housing unit in this way, to convert that unit to Project-Based Section 8 financing using the same RAD process that THA used to convert its original public housing portfolio. Also importantly, HUD's rules allow THA to apply this financing not only to newly built housing but also to housing it buys. That financing could help to finance either construction or purchase. THA should pull down all of its Faircloth units. There may be some urgency to doing this because there is some Congressional interest to change these rules.

2.2.5 THA's Systems Need to Support Its Real Estate Development

When THA builds or acquires new properties, it imposes a burden on THA's internal services, including financial services, property management, and asset management. That burden is an important factor when making the asset management judgment of whether to build or buy. In general, however, THA needs to adjust its systems so that adding a new property is not so disruptive. It may mean that we have to staff up for the added work. It should **not** mean that we have to redesign our systems. If we do, then those systems need redesigning in advance.

2.2.6 The Importance of Design in Real Estate Development

THA's new construction is notable for its attractive design, especially for its consideration for the design needs of children. This consideration means housing and neighborhoods that feel soft rather than hard. It means planting a lot of trees, especially those that grow big with large crowns. It means detailed attention to play areas. It means incorporating outdoor and indoor art. It means the use of color. [Color serves several purposes. It can spice up the landscape. This is important in a climate like Tacoma's that is gray for much of the year. It can also make a housing development engaging and safe for children. For example, varying the color of buildings within a development and the floors and doorways inside a building allow a 4-year old to find her way home. She may not know her address or her apartment number, but she will know she lives in the red building or on the floor with the red door. And from there, she can find her way to her friend who lives behind the yellow door.] All this takes time, thought, and money. It is worth it, for at least two reasons.

- Lovely Properties Elicit Community Support that THA Needs: THA's ability to do its work requires the support and welcome of the city and the neighborhoods. THA is more likely to elicit this support and welcome if people know that THA's buildings will look lovely.
- THA's Clients Need and Deserve A Lovely Place To Live: THA's clients need and deserve a lovely place to live. A mature research literature reports that the wellbeing of a person and a community increases if people feel that their home and their neighborhood are lovely. The literature is not clear why this is. Part of the reason is probably that lovely buildings and neighborhoods convey the clear message that people are valuable and valued. And that they are worth the effort. Part of the same literature focuses on the effect that trees have on people. Trees will make any community prettier and more inviting. Children who walk to school beneath a tree canopy, rather than along a noisy high-speed roadway, will arrive refreshed.

THA tells itself that, when it comes to design, both lovely and ugly are contagious. THA's job is to promote the lovely.

2.2.7 Real Estate Development Performance Measures

Many performance measures apply to THA's specific real estate developments. *E.g.*, financial sustainability, construction quality; construction on schedule; contracting and employment goals. Three performance measures in particular apply to THA's overall real estate development. All are important. One is commonly understood; the others less so:

- Number of Units as A Performance Measure of Real Estate Development: THA should track the number of new units it adds to its portfolio. This is straightforward enough.

- Number of Unit-Years as a Performance Measure of Real Estate Development: THA should also track the number of unit-years in its portfolio. A unit-year is the number of years of useful life a unit has left before it needs a big fix-up. For example, a newly built unit will not need major fix-up for 25 years. It has 25 unit-years. Another unit that is in poorer condition may have only 3 years left, 3 unit-years. In this way, unit-years is a measure of the portfolio's condition and THA's stewardship. I attach a sheet that tracks both of these metrics since 2002. It shows that from then to the present, THA increased its count of units in its portfolio by 472, a 29% increase. It increased its unit-year count by 32,452, an 840% increase.

- THA's Shadow Portfolio: THA helps other organizations to finance and develop their properties as affordable housing. Sometimes THA provide the land. Sometimes THA is a lender or issues conduit bonds. Sometimes THA is the developer. Most of the time, THA signs long-term contracts promising to pay fair market rent into the property. That promise supports construction debt to get it built. These units are THA's "shadow portfolio". THA does not own it or manage it, but these units add to the city's stock of affordable housing. This "shadow" portfolio is about 1,000 units, and growing. It, too, is valuable.

2.3 Property Management

THA will manage its properties so they are safe, efficient to operate, good neighbors, attractive assets to their neighborhoods and places where people want to live.

THA's property management strategic objective shares the same goals as its real estate development objective: to so manage THA's properties that they are among the best around. This quality is important for the same reasons that impel the need for high quality in real estate development.

When I became THA's executive director, THA did not manage most of its portfolio. Private fee managers did. They did so at the insistence of our tax credit investors. Tax credit investors count as the property's owner for the 15-year duration of their contract. As the owner, they get to choose the property manager. At the time they required private management companies because they thought that a public housing authority would screw up the tax credit compliance. This is an important issue. Screwing up tax credit compliance has serious consequences. It can imperil the investor's tax credits. If that happens, THA can be liable to cover their losses.

When I became executive director, we resolved to get that work back in house. We did that for reasons that remain pertinent to all parts of our portfolio, especially those financed by tax credits or by debt. Here are the main reasons we wanted to do that work ourselves:

- THA's Does the Work Better: We felt then, and continue to feel, that THA can do a better job than the private fee managers, for three reasons. **First**, some of the private managers did not do the tax credit compliance work very well. We knew we could do better.

Second, THA's standards of stewardship are very high. Having built these properties, no one cares more about them than THA. **Third**, THA treats its clients very well – with a full interest in their success. THA's staff also engage effectively with clients who are disproportionately persons of color, households headed by women, persons who speak other languages, and clients with a full range of disabilities. THA is also well equipped with case workers whose services are a valuable tool in the property management toolkit. All this results from a staff highly motivated by the work and its social justice mission. We did not see that in the staff of the private companies.

- Efficiency: If we are going to manage any significant part of our portfolio, we should manage most of it for the efficiency of spreading our centralized costs over a larger number of units,

- Jobs for THA's staff: We want those jobs for our people. It makes us a more stable employer. And it relieves us of a problem we felt using the private companies. Those companies will always outbid us for the work, but it is for reasons we cannot admire. In general, they pay their staff poorly, and their benefits are weak. We did not like feeling complicit in this.

- Control: Whether or not THA uses a private property management company, it bears the final responsibility for the portfolio. When something goes very wrong with a property, for example ,the mayor will not call the private company. She will call the THA executive director. If THA is to bear that responsibility, it should have the commensurate degree of control. That means doing the work ourselves.

For these reasons, THA's first preference when it builds or acquires new property has been to manage it in-house. Yet, this is not always easy to arrange because THA's property management costs are comparatively higher than private companies. Sometimes our costs cannot support the debt we incurred to build or buy. Our goal in property management should be to

To whom this may concern, I am sending this in regard's to the program that my grandchildren are attending at McCarver. They have been in the program for 2 yr's and I have seen a great improvement in there grade's and there ability to learn sooo much and the counslor's are great!!!! My son has come along way also, He has and is still learning different idea's for his girl's. My sole THANK-YOU'S go out to all the teacher's and social worker's that take time and alot of effort to make this program work. The real people that are the backbone of this program is the one's that are in the housing area; They have alot of patience for what they do on a daily bases. I would like to really put a shout-out to CARLENA ALLEN,BSW at McCarver elementary, she has been a god send for my son and my grandchildren, she has had to indure alot from my son, but,she never gave up, 2 year's later, and my son and his girl's have a life.. Thank-you.. I would love to see this program in EVERY school, People have problem's in all areas of the state, this program is benefical for anyone who is alone or just need;s a steady daily life with help, this is the program.Mr and Mrs Gates did great service to think about this kind of program, I hope that this program continues with the grants that it deserves..I just wanted to let you know and please continue this program for the next generation. THANK-YOU,
L [REDACTED] [REDACTED]

[Email to THA, 2013-9-27]

reduce our costs enough to make THA competitive. We should not expect ever to be as inexpensive as the private companies. Instead, we should try to be close enough in cost so we can make the following case to the investors or lenders: “*we know we are more expensive, but we are worth it*”.

We have successfully made that case to our tax credit investors who have let THA be the property manager of our tax-financed portfolio for more than 15 years. It has worked well as we have built an impressive track record. But it is a continual discussion with investors and lenders that we should not take for granted.

2.4 Financial Sustainability

THA seeks to be more financially self-sustaining.

THA is in very good financial condition. Three factors help to explain this.

- **THA Budgets Conservatively:** The Board and staff have budgeted conservatively. We have used three budget principles that have served us well. The **first** budget principle concerns our federal allocation. Congress is supposed to pass a federal budget for the calendar year by the previous October 1st. HUD would then take several months to filter the appropriation through its complicated funding formula to inform public housing authorities of their allocation. In the past 17 years, Congress has rarely been on time. We have rarely known what our year's allocation will be when the Board adopts the THA budget in December. This means that the staff must propose, and the Board must adopt, a budget without knowing what THA's income will be. Accordingly, our first budget principle has been to budget to the worst of the plausible federal budget proposals then working their way through Congress. To identify the worst plausible budget, we rely on our congressional delegation and our liaisons in D.C.

The **second** budgeting principle is that recurring expenses must fit inside recurring income. We do not like to spend reserves, which are nonrecurring, on recurring expenses, because doing so is not sustainable. Applying this budgeting principle is not always straightforward. Whether or not an income or an expense is recurring is

Michael: I have thought a bit more about our unsuccessful efforts to secure the Hillside Terrace project. The most disconcerting aspect of the outcome is that, Salishan 7 aside, we will not have the opportunity to continue working with THA for some period of time. We have enjoyed working with THA more than any public agency that comes to mind. You and your staff have epitomized “Teamwork.” We never take that for granted.

We admire that you ran a fair and transparent selection process. While fair and open dealing is fairly commonplace in the NW, THA does it with a grace and calmness that makes we at Walsh very envious of anyone who is fortunate enough to secure your business. We will use this experience to refine and improve our efforts on future RFP's. Thank you for all the opportunities that you have provided. As always, your humble (well, maybe not so much) servant.

- Tom Mathews
- President, Walsh Construction
[Email to THA, 2010-2-25]

often a matter of characterization. But in that characterization, we have been conservative.

The **third** budgeting principle has THA preserve the right amount of reserves, both federal and non-federal reserves . Reserves are important for three reasons: (1) THA needs enough reserves on hand to operate safely through uncertainty. For example, reserves have allowed THA to manage without disruption through several shutdowns of the federal government. Last year's shutdown lasted over a month! (2) THA needs enough reserves to show itself to be creditworthy when shopping for debt or investors; (3) The ability to accumulate reserves is essential to long-range planning, such as real estate development. Yet we should not sit on too much cash. We must remain mindful about the unmet need for housing. We must also remember that HUD has shown an interest in sweeping PHA reserves it considers excessive.

- THA's Real Estate Development Makes Money: The second reason for THA's financial health is that its THA's real estate development work has become a source of income.
- THA's Moving to Work (MTW) Status: Perhaps most important, THA is in stable financial condition because of its MTW status. This status does not get us more money, but it makes the money more flexible. It has allowed us to ride out the oscillations in federal funding. As I note in section 3, preserving the MTW status from HUD changes will be one of the important challenges ahead.

THA has long harbored three ambitions that, if they work, would further strengthen THA's financial stability.

- THA Selling Real Estate Development Services: THA has sought to make money by selling its real estate development services to other organizations. We had our first customer several years ago when we developed Prairie Oaks for a nonprofit in Lakewood. We earned a developer fee by that work. We are about to serve as a development consultant for Shiloh Baptist Church. We do this type of work for three reasons: we are pleased to help a worthwhile project that furthers our social justice goals; we are pleased to do work that can strengthen a community partner; we also do it to make money.

To sell our development services at scale, we will need to systematize our project management systems.

- THA Selling Property Management Services: THA also has aspired to sell its property management services to other organizations. We essentially do that by selling our services to the tax credit investors who own our portfolio. However, while they are the owners, it still feels like we are managing our own property. THA has long-range ambitions to extend this work to properties that other organizations own.

- THA Properties that Produce a Rental Income Stream: THA aspires to buy or build properties that make us money through their rental stream. These properties can do this by charging rents at the lower end of the market to households that still have an income to support those rents. That income subsidizes THA's services to lower income households. We have had some notable successes in doing this. *E.g.*, Outrigger Apartments, Highland Crest Apartments.

Further income opportunities may arise as THA extends further into its ownership and development of commercial property.

2.5 Environmental Responsibility

THA will develop and operate its properties in a way that preserves and protects natural resources.

This strategic objective recognizes that THA is a steward of notable resources. It directs THA to exercise this responsibility in a way that is environmentally responsible. I think we know what this means when we develop real estate. That shows in our compliance with various certifications of “green” building techniques. It shows in our effort to bring higher density to neighborhoods and to locate our housing near transit. I think THA needs to learn more what environmental responsibility means when it manages its operations. One notable example of THA’s operational success in this way is the open project to give THA’s portfolio a generous tree canopy. That is going well.

2.6 Advocacy and Public Education

THA will advocate for the value of its work and for the interests of the people it serves. It will be a resource for high quality advice, data and information on housing, community development, and related topics. THA will do this work at the local, state, and national levels.

THA is many things: real estate developer, property manager and landlord, provider of rental assistance, and supportive service provider. As this strategic objective makes clear, THA is also an advocate. It also has a companion responsibility to be available to policy makers as a source of high-quality advice, data, and information on housing and community development.

Advocacy is time consuming. It requires the careful nurturing and maintenance of close relationships with the Tacoma City Council, Pierce County Council, the state legislature, and our congressional delegation, and their professional staff. It requires close collaboration with advocacy partners. Notable advocacy partners include the Tacoma-Pierce County Affordable Housing Consortium, Association of Washington Housing Authorities (AWHA), and the Council of Large Public Housing Authorities (CLPHA). Although time consuming, this work is well worth the effort. It serves three related purposes, all of them important:

- Advocacy for Clients and Low-Income Communities: THA must speak up for its clients. It must help them speak up for themselves. Doing this is part of the service THA can provide. It is well-positioned to do this because it knows its clients well.
- Policy Advocacy and Advice and Data to Policy Makers: Policy advocacy is important to the effort to get policies and funding that are congenial to THA’s work. Recent examples include THA’s successful effort to help negotiate tenant protection laws in the state legislature. That work was necessary to balance the interests of tenants, their neighbors, and public and private landlords. THA worked to support the Tacoma City Council’s passage of a 1/10th of 1% sales tax for affordable housing. That new tax will create a \$5 million per year fund that will prove useful for THA’s developments and programs.

As part of this work, THA has participated, and continues to participate, in numerous advisory groups and tasks forces. Presently, they include the City of Tacoma's Technical Advisory Group for the implementation of the City's Affordable Housing Action Strategy. It participates in a comparable task force advising the Pierce County Council. Those task forces will make recommendations to the city and county councils that, if adopted, will be the most notable advances ever seen in local policies to preserve and create affordable housing.

- Advocacy and Public

Education Allow for Fund Raising: If THA is useful to policy makers in these ways, they are more likely to help THA when we ask for help. For example, in this recent legislative session, THA successfully sought funding for its Arlington Drive Campus for Homeless Youth and Young Adults, its Shiloh Baptist Church development, and the THA Affordable Housing Acquisition Project. That success did not happen only because of the merits of the requests. That success is the product of years of relationships with legislators who learned to trust THA and its work.

2.7 Administration

THA will have excellent administrative systems. Its staff will have skills that make THA highly efficient and effective in the customer service it provides to the public and among its departments. It will provide a workplace that attracts, develops, and retains motivated and talented employees.

THA needs administrative systems that are transparent and efficient. It needs them for two reasons, an outside reason and an inside reason. The outside reason is that THA's clients, partners, investors, regulators, and the public expect it. And THA owes it to them. The inside reason is what THA owes to its staff. Life is too short to put up with administrative discombobulation.

"My name is J. [REDACTED] and I have been a grateful client of the Tacoma Housing Authority via its housing choice voucher program.

Dana Duncan has been my talented case worker for quite some time now and I wanted to take this opportunity to express my appreciation and gratitude—not only for this wonderful program—but also for the immense help and continuous support I receive from Miss Duncan.

Dana has gone miles beyond her professional obligations by guiding me through an immensely stressful search for a new home by supporting me with her knowledge, kindness, and an always calm demeanor.

At times I felt quite overwhelmed and hopeless, yet [Dana's] supportive and positive attitude never changed even in the slightest.

Thanks to Dana and the Tacoma Housing Authority I felt empowered to complete my Bachelors Degree, while in turn inspiring my 12 year old child to view education as a gift instead of a chore.

Lastly, I would like express my deepest gratitude and appreciation for Dana and THA's generous assistance, hence allowing me the opportunity to learn and grow; your continuous support not only impacted me but also changed my son's life for the better—and for that I will always be grateful.

I wish you a Great Christmas and a wonderful 2020!

- J.

[Email to THA, 2019-12-16]

THA has made very good progress in improving its administrative systems, and it is primed to make some long-pending further advances. Here are some notable areas needing attention. That attention is presently underway, especially with recent new positions and talented new hires who will give THA a necessary expertise that it has not had before. This work is important. The Board will need to understand and assess this importance because the work is also expensive:

- Software: THA's present business software is OpenDoor. THA designed it using Salesforce. That was 4 years ago. It is a notable achievement, but it still needs a lot of work. THA is studying whether to continue to invest in it or to give it up and choose an alternative. How we got to this point is revealing about THA and its own self-confidence and ambitions.

About five years ago, THA needed to change its mainline business software. Our vendor at the time had been purchased by a company that stopped supporting the software. We had two choices. We could buy an off-the-shelf product made for the public housing industry. This was the safe choice. The software would be ready made. It would be compatible with HUD's software. But it would do only about 70% of what we need, and it would be hard to customize. We would have to curb our programmatic ambitions by the limitations of the software. For an innovative PHA like THA that is a serious shortcoming.

THA chose the second alternative. We decided to design the software we need, with the help of very expensive consultants and developers. We chose the Salesforce platform. If we pulled it off, it would do 90% of what we need. It would be easier to modify. It would follow our programmatic ambitions rather than limit them. If it worked well, we also had a prospect of selling our software to other PHAs on the Salesforce marketplace. If it turned into a complete bust, people would read about us in the newspapers. Choosing this option required THA to measure its own self-confidence and ambition. I am proud of THA's staff for its choice.

Salesforce, however, has been more difficult to program than we had anticipated. Investing in the further attention OpenDoor needs effectively will turn THA into a software developer. Doing that offers the same enticing prospects that got us to this point, but it will be risky and expensive. Meanwhile, we are studying some off-the-shelf products. Most every other administrative need will depend on the answer to this software puzzle.

Fortunately, THA has a very talented IT staff. That capacity got much stronger with our new Chief of Information Technology. THA is in good hands to lead it to a reasonable answer.

- Performance Management: THA can expect that the software solution will finally provide the capacity to track and report on performance measures. I attach the performance measures that the Board adopted in 2016. The further step of choosing targets has awaited this software capacity. That ability will change Board meetings and Cabinet meetings. We will be able to spend less time asking what is happening and more time discussing what to do about it.

- Business Processes: THA is making progress, finally, on writing or rewriting its business processes. We have created a position dedicated to this effort and assigned it to a

talented staff person who is well versed in what the effort requires. We are creating further positions from each department to help her. A main factor in this progress has been a wider acknowledgement among staff, including senior staff, that business processes are necessary. Fixing our software difficulties will be a big further help.

- Document Management: THA needs a new, unified way to store and retrieve digital documents. Our present way to do that is inefficiently splintered among the Share, Shadow, department, and individual drives on the server, Teams, Sharefile, and staff's individual computers. We have created a new position for someone to manage document management. We are also shopping for the right software for this purpose as well.

- Project Management: Our present software has a project management tool of our own design. I attach its on-line orientation memo. The memo describes the purpose and capacities of the tool. When we switched to Salesforce, we redesigned it in OpenDoor. The new OpenDoor version is still powerful but the limitations of Salesforce have been troublesome. Even so, staff use of the tool has been growing as more people realize the value of project management. Yet it is not clear whether the extent of that interest will sustain a further investment in the tool either with Salesforce or a replacement software. Because of that uncertainty, I attach a printout from the data base showing the current open and future projects.

“Wow this is amazing! [\$1,000 Special Recognition Award for all staff] You can truly see how the board appreciates THA Employees! Although I won’t be receiving it because my first day was 8/3/2020, this is still another sign that I decided to work for the best agency ever! Thank you for making this place such an amazing place to work!”

- Shauna Thompson
THA Office Assistant

[Email to THA, 2020-10-29]

This printout can show how such a tool, in addition to its advanced capacities, can at least provide a list of work to undertake. This printout may increase the chances that THA will see the value in continuing some version of the tool. In case THA does not continue it, this printout can at least remind the Board, and staff, what projects were, at least at one time, thought worthwhile. An example is the future project entitled “*Credit Reporting for Good Rent Paying Tenants*” Project No. PI-2015-007. This project acknowledges that most THA tenants pay their rent in full and on time. That history of rent paying is valuable information that can help tenants build their credit. Building their credit is an important part of asset building, a THA goal for its clients. The three main credit reporting agencies have shown a tentative willingness to receive this information. Yet THA is sitting on this information and not putting it to that good use. This project would have THA, with clients’ permission, automatically report their good rent-paying history to the credit reporting agencies. Yet, without at least this record of the project, THA will forget the idea. It will have to relearn the possibility, probably by chance, perhaps when a staff person happens across a study on the matter or attends a conference.

I am optimistic that THA will make the necessary progress on all these administrative systems. It will be expensive, with substantial investment in new staff with the necessary expertise. But I hope the Board concludes that it is worth it.

3. THA's MOVING TO WORK STATUS: ITS VALUE AND THE ADVOCACY EFFORT NEEDED TO PRESERVE IT

Much of THA's success, innovation, and financial stability result from its status, among 3,400 public housing authorities in the nation, as one of only 39 that are Moving to Work (MTW). This status is very valuable. It does not get THA more HUD funding, but it makes the HUD funding more flexible, in two ways. Normally, HUD's funding comes in silos to be spent mainly on activities within that silo. For example, for a non-MTW PHA, Section 8 voucher dollars (the largest silo) must be spent mainly on vouchers. MTW turns HUD funding into a block grant that THA can spend without regard to the restrictive silos. Also, MTW status allows programmatic flexibility in designing assistance programs. For example, THA uses that flexibility to impose time limits and fixed-subsidies on rental assistance, to invent property-based subsidies, to fund the county's Rapid Rehousing assistance for homeless families and for young adults, to do the Arlington Drive Campus for Homeless Youth and Young Adults, and to do its Education Project. In general, MTW has been the best tool for THA to do its best work.

All the MTW contracts of the original 39 agencies, including THA's, will expire on December 31, 2028. MTW has some vocal national critics who will oppose the extension of those contracts. This means that extending the contracts will require a sustained advocacy effort by all the MTW housing authorities. Here are some thoughts about that advocacy effort.

3.1 The Early Need for Advocacy to Preserve MTW

It may seem like 2028 is a long way away. But well before then the uncertainty of whether THA will retain its MTW status after 2028 will limit THA's ability to consummate long-range financing and partnership agreements. For example, THA's ability to finance its RAD conversion of its public housing portfolio was feasible only because of THA's ability to commit to its investors that it will provide a MTW rental subsidy to the properties for 15 years. This means that the advocacy effort to preserve MTW must begin well in advance of 2028.

HUD will be one audience for this effort. Yet HUD leadership has not generally favored MTW. This means that the main advocacy focus will be on Congress. Congress has been the main proponent for MTW's survival and expansion over the years. For example, when the 39 MTW contracts were set to expire in 2018, Congress directed HUD, over HUD's objection, to extend the contracts to 2028. Congress also directed HUD to expand the MTW program to another 100 housing authorities. This expansion is encouraging, but it also contains a threat to the original 39 MTW PHAs. The terms of the expansion confer only a limited measure of flexibility. We refer to those terms as MTW "lite". HUD has indicated that in 2028 it means to fold the original 39 MTW agencies into the newer "liter" version of MTW. That is why HUD refers to the 39 as "legacies". That would be a defeat for THA and the MTW program. The challenge is to prevail on Congress not only to extend the 39 contracts but also to do so on the present terms.

THA needs to participate in this advocacy to preserve its MTW status. This will take time and effort. It is worth it, for several reasons. **First**, the issue is critical to THA and its

effectiveness. **Second**, THA is a notable national example of what MTW flexibility can accomplish. Its example will be useful for advocacy. **Third**, THA has strong local support for its uses of the MTW flexibility. This will allow THA to enlist the advocacy support of many local partners, such as the city, the county, the state legislative delegation, the Tacoma Public School District, TCC, UW-Tacoma, and its many nonprofit and for-profit partners. **Fourth**, Washington State's Congressional delegation will be instrumental in the Congressional debate on the question. Senator Patty Murray in particular has been a national MTW champion. [She is the reason why, after a 5-year effort, THA became an MTW agency in 2010.] Representative Derek Kilmer will be influential as well because he is on the House Appropriations Committee. For these reasons, THA is necessary to the effort. It will have a lot to contribute to it, and it will have a lot of help both locally and nationally. CLPHA will likely be the main organizer of the national advocacy.

THA's effective advocacy will require THA to be fluent about the case against MTW, and the case for MTW. There is an ample literature about MTW, with many studies and policy papers. Here are the basics:

3.2 The Case Against MTW

These are the notable critiques of MTW:

- Lack of Performance Measure Data: Critics do not believe that there is sufficient data showing that MTW flexibility has achieved its three statutory purposes: (1) reducing costs and achieving greater effectiveness in federal expenditures; (2) give incentives to families to work and become economically self-sufficient; (3) increase housing choices for low-income families. Multiple studies on this question show mixed results.
- Disagreement About Policy Choices: Critics of MTW disagree with some policy choices that MTW agencies have made in the use of their programmatic flexibility. THA is a good example of what critics see as the problem. THA has imposed time limits on rental subsidies. It has imposed fixed subsidies. MTW critics do not favor these policy choices.
- Redirection of Section 8 Voucher Dollars to Other Purposes: The main critique of MTW is that it allows agencies to spend Section 8 voucher dollar on other uses. According to this critique, the best use of that dollar is on tenant-based Section 8 voucher. The voucher program is the nation's premier program to house low-income households. It is meant to allow households the freedom to choose their own neighborhoods and schools. This contrasts with the public housing portfolio which, in a stereotypical characterization, locks families into poor neighborhoods with poor schools. The MTW critique does not favor spending a tenant-based dollar on a portfolio. It also does not favor spending that dollar on supportive services, because it is not housing. And it surely does not favor spending it on administrative costs because it is not housing and it is not even services.

THA has a reply to this critique. See the next section.

3.3 The Case for MTW

The case for MTW is strong for reasons that THA demonstrates in its uses of MTW flexibility.

3.3.1 THA Should Feel Good About Its Policy Choices

THA's effectiveness as an MTW advocate arises from its confidence in how it has used the flexibility. Section 2 above recounts the reasons for these choices and for the confidence. The Board should be well versed about those choices and those reasons.

3.3.2 THA Spends Voucher Dollars on Other Purposes for Good Reasons

All MTW agencies, including THA, spend the vast majority of their Section 8 voucher dollars on section vouchers. In that way the critique of MTW on this issue is at the margins. The critique arises because all MTW agencies do spend some Section 8 voucher dollars on other purposes. THA does this. It spends enough dollars to backfill the underfunding from Congress. It does this for reasons central to THA's work and standards of stewardship. These reasons also completely align with the three statutory purposes of MTW to promote efficiency, self-sufficiency, and housing choice, as follows:

- Spending on the Portfolio: THA spends Section 8 voucher dollars on its portfolio: building it, buying it, and maintaining it. Critics of this expenditure might know the second thing about that portfolio. They might know the fifteenth thing. But they overlook the first thing about the portfolio: that it is valuable. As I noted in section 2, the portfolio is how THA houses people in one of the nation's tightest rental markets that is not congenial to vouchers. The portfolio is how it houses its neediest households who, because of race, parental status, language, or disability, would find the private market unwelcoming even if they had a voucher. The portfolio is how THA invests in neighborhoods that need the investment.

The portfolio is also THA's front door. What the public thinks about all of THA's endeavors depends on the appearance and management of its properties.

The portfolio is different in another way from Section 8 vouchers. It is different in the same way from public assistance, food stamps, SSI, Medicaid, and Medicare. The government

"Hey Mr.Mirra! My name is M [REDACTED]
[REDACTED]..I just wanted to let you know I'm very thankful for salishan and my landlord's Barb and Tonya, for blessing me and my family with this opportunity to have a home. Tonya was my first landlord here and she always made me want to strive and do my best to be my best in life! And when an unfortunate event happened with my last unit Barb was right there making sure everything went well and that my family and I where in another unit extremely quick due to mold. She had me moved in a flash and without their hardwork I don't know what my family my children and I would have done specially that I ended up having my daughter 1 month early during that exact time. I mean I can't put in words everything they've done for me I truly love them and will forever be thankful to them both! Thank you also Mr.Mirra for all that you do for families like mine! We are forever blessed! THANK YOU!!!

P.S. Tiffany is my new landlord and I'm just as thankful for her kindness as well :)
- [Email to THA, 2018-1-24]

can hand out those forms of assistance until the money runs out and then tell people to go away. When the money runs out on the portfolio, it will still be on the ground the next morning, filled with families, and next to neighbors to whom THA owes important responsibilities.

- Spending on Supportive Services: THA also spends Section 8 voucher dollars on supportive services. Section 2 explains why. These services are central to THA's understanding of its mission: not only to house people but also to help them succeed as "tenants, parents, students, wage earners and builders of assets." THA also spends voucher dollars to support Pierce County's Rapid Rehousing program for homeless families and homeless young adults.
- Spending on Administration: THA, like other MTW agencies, also spends Section 8 dollars back filling Congressional underfunding of administrative costs. THA spends money on all the infrastructure to administer something as complex as a public housing authority with the high standards of stewardship that makes THA effective. This includes IT, risk management, asset management, human resources, procurement, and general administration. These expenses also include services that make the housing we provide more accessible. *E.g.*, landlord liaison services to help voucher holders find landlords.

THA can, and should feel confident about these funding choices. Yet, it must recognize that they do leave families on the voucher waiting list unserved. If THA did not redirect any Section 8 dollars in this way, it could serve another 400 families off its waiting list. This is a "cost" of these decisions that THA must bear in mind. In that way, these funding decisions impose a tradeoff of benefits. Such tradeoffs, however, characterizes most choices in THA's business. Indeed, there is probably not a single decision THA can make to serve someone that will not disadvantage someone else. That is a reality of doing this work amid overwhelming need with insufficient resources.

In finding this balance among tradeoffs, THA does honor some guardrails to ensure against shifting too many voucher housing dollars to other uses. There are three main guardrails:

- Serving THA's Baseline Number of Families: HUD assigns to every MTW agency a baseline number of families it must serve. In general, this baseline implements the statutory MTW directive that MTW agencies serve "substantially the same" number of families that it would serve if it were not MTW. HUD's directive to THA is to serve 95% of that baseline. THA presently serves more than 100%.
- Backfill Underfunding but Do Not Over Backfill: THA spends voucher dollars to backfill the administrative losses resulting from Congressional underfunding. But THA does not backfill more than that.
- Expenditures Aligned with THA's Mission: The main reassurance against excessive redirection of Section 8 funds comes from THA's focus on its mission and on expenditures that further it effectively.

THA has devised a one-page data visualization that helps to track its decisions and the tradeoffs they represent. I attach a copy. I recommend that THA update this visualization as part of each year's budget drafting. Doing that will keep the tradeoffs in clear view.

3.3.3 MTW Allows for Local Choices to Account for Local Markets

An important part of the case for MTW flexibility is the ability it gives PHAs to make these hard decisions locally. That ability is important because, if they are to be effective, housing and services programs have to be designed locally. They have to enlist local voices. They have to account for the local housing markets. THA's policy and funding choices do that. HUD is not well situated to second guess those choices from Washington, D.C.

3.3.4 The MTW Critique Arises Mainly from Limited National Voices; THA has Strong Local Support.

Most of the MTW advocacy critique arises from the rarefied and highly distilled air of Washington D.C. It comes largely from two D.C. organizations: Center for Budget and Policy Priorities and the National Low Income Housing Coalition. In Tacoma, where THA does it work, THA has very strong support for its policy and spending choices. This should also be reassuring for THA.

4. SOME OTHER THEMES

Here are three additional themes in THA's work that will always need attention.

4.1 The Value of Partnerships

THA cannot do its work without partners and community support. THA, therefore, is very fortunate in the strength of its partnerships and the measure of community support it enjoys. I attach some letters and emails showing the strength of THA's standing in the local, state, and national scene. These partnerships and community support are very valuable assets. They require attention and care. That can take a lot of work and time. They are worth it.

4.2 The Value of Control

THA's effectiveness often depends on its retaining adequate control over its initiatives, properties, or operations. It should remain alert for ways to retain appropriate control and for risks that it may lose control. Here are some examples:

- Ownership of Properties: THA uses sophisticated forms of financing for its real estate development. For example, it relies heavily on low-income housing tax credit equity from investors. That financing requires the investors to count as the owner of the properties for 15 years. After that time, whether or not THA can resume ownership by buying out the owners, and on what terms, depend on the language in the initial contracts. Those documents are complex. The meaning of the buy-out provisions is often unclear. Aggressive assertions and lawsuits from investors are seeking to exploit the ambiguity to claim ownership. These types of investors – called aggregators – have the money to wear out affordable housing organizations in litigation over the ambiguities. THA has an open project to examine our vulnerability to these claims.

Other opportunities and threats to ownership arise when THA partners with other organizations to develop housing. THA is often the source of the land. THA should remain the owner. For example, an important safeguard of the Salishan redevelopment left THA as the owner of the land. While it gave control of the land to partners through long-term leases, THA's continued ownership of the land is a reassuring measure of control should all else fail.

Even if THA owns the land, it may not own the housing, and it certainly does not own the leasehold interest. In those cases, THA should insert into the documents two important but distinct rights: the right of first refusal; the right of purchase. Both are important.

A right of first refusal and a right of purchase also should show in the deal, if possible, as conditions of any financing THA may offer to another organization.

- Property Management: In section 2, I review the advantages to THA and its clients of THA managing its own properties.
- Quality of Supportive Services from Partners: More and more often THA will contract with other organizations for them to provide supportive services or even property management services in housing that THA has financed or owns. In these arrangements, THA needs meaningful contractual remedies if the partners fail to perform. These remedies can include THA's contractual right to replace the partner with another or THA's resumption of ownership or management control. The Arlington Drive Campus for Homeless Youth and Young Adults presents an interesting version of this issue. THA is very lucky to have two high-performing service partners at Arlington Drive: Community Youth Services and the Social Impact Center of the YMCA of Greater Seattle. Yet, THA must be equipped with remedies should they fail to perform over the decades we anticipate for this partnership. THA owns the land and the buildings. That will help. More complication arises from the fact that the city, county, and the state provide the funding for those services. To keep a necessary measure of control, THA should arrange that funding to come through THA for disbursements to the service partners. That entails more administrative work on THA, and paper shuffling. But the extra administrative work is worthwhile to prevent a failing service partner from leaving and taking the service funding with it.

4.3 Diversity, Equity, and Inclusion Work

In 2019, THA began a project to better understand, review and promote values of diversity, equity, and inclusion in THA's work. It seeks to do this in three areas: THA as a workplace for staff; the design and delivery of its services to its clients and to its community, and THA's advocacy in local, state, and national discussions.

That project has been slow to take shape. The Cabinet recently decided to engage a consultant to give the project some needed direction and content. I hope the Board will continue its support for this important work. Judging from the experience of other organizations farther along on this path, this work done well, with effective engagement and insight, can be very valuable. Done poorly, with an imposed, exclusionary orthodoxy, it can be inhibiting and

destructive. As THA finds its way through this effort, it will need the Board's continued active interest.

I think the project and its necessary discussions will feel more recognizable to staff, and more meaningful, if they are allowed to see, and invited to see, that they are already deeply engaged in DEI work by virtue of their deep, professional commitment to THA and its mission. An affordable housing organization, especially one like THA with an expansive understanding of that mission and its social justice value, is necessarily committed and working to undo the racial inequities long baked into the housing market and therefore long imbedded into all other elements of the community. In the prevailing vernacular, THA's work is already "antiracist". This acknowledgement will help invite staff into the discussion, help them relate it to their work, and help to keep the DEI discussion focused on furthering THA's housing mission.

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5. THA's WONDERFUL STAFF

THA needs three main assets to do its work: financing; partnerships, and a talented staff. THA is lucky to have all three. It is especially lucky in its staff. As a group, they have a rare combination of substantive expertise and talent, strong belief in THA's social justice mission, a focus on the clients, a strong commitment to each other, and a good humor.

These qualities show in the attached sample of emails and letters from clients and partners. They describe how the staff makes THA shine. The strength of THA's staff was also on full display during the recent leadership transition. My departure coincided with the retirements of three department directors. Those other retirements hastened my own for two reasons. I did not want to hire their replacements and then leave in a few years. I also think my successor needs to hire them as her way to put her fingers on the agency.

This meant we needed Interim Directors to lead those departments and to fill a cascading series of vacancies. We presently have interim appointments in 6 senior positions. This is where the quality and depth of THA's staff show. We found the interim leaders we needed from within ourselves. Most prominently perhaps was the ability and full readiness of THA's excellent Deputy Executive Director to step up as Interim Executive Director.

At the top of this long memo I mention the Board first. Now at the end of this memo, I mention the staff. These are the essential bookends that together make THA work so well. I am grateful to all.

Thank you!

"Merry Christmas Michael,

"I believe those of us who provide a public service, especially long term, are impacted so severely on an emotional level. Many of us work face to face with our clients on a daily basis, so much so, that we not only know them, but know their families and friends as well. And we worry, not for ourselves, but for our clients.

"It is stressful, but I feel like maybe this is where we excel. We take these hits as individuals, and as an agency on the whole. It is painful, it does hurt and it is devastating at times, but, we pull it together with grace, poise, and (in Sha's case a little panache), and finesse or (muscle) not just our agency family, but our whole portfolio family (because they are like family) through it. "We are enduring some very trying times right now, and are under a lot of pressure. However, we happen to handle both of those well. This time is no exception. If this lasts longer than anticipated, some agencies may not fare well, and I'm sorry for that. But our agency and our board have always planned well for any possibilities that may occur, so well in fact our contingencies have contingencies. Thank you for that.

"You have very strong team under you, comprised of very strong individuals.

"We've got this."

Kindly,

Melody [THA staff person] *[Email to THA, 2018-12-26]*



TACOMA HOUSING AUTHORITY

Statements of Vision, Mission and Values

Amended by the THA Board: February 27, 2013

THA's Vision

THA envisions a future where everyone has an affordable, safe and nurturing home, where neighborhoods are attractive places to live, work, attend school, shop and play, and where everyone has the support they need to succeed as parents, students, wage earners and neighbors.

THA's Mission

THA provides high quality, stable and sustainable housing and supportive services to people in need. It does this in ways that help them prosper and help our communities become safe, vibrant, prosperous, attractive and just.

THA's Values

Service

Work in service to others is honorable. We will do it honorably, effectively, efficiently, with pride, compassion and respect.

Integrity

We strive to uphold the highest standards of integrity and ethical behavior.

Stewardship

We will be careful stewards of the public and private financial and environmental resources entrusted to us.

Communication

We value communication. We strive to be open and forthcoming with our customers, employees and colleagues, our partners, and our communities. We will listen to others.

Diversity of Staff

We value the diversity of our staff. It makes us stronger and more effective.

Collegial Support and Respect

The work we do is serious. We seek to create an atmosphere of teamwork, support and respect. We also value a good humor.

Excellence

We strive for excellence. We will always seek to improve.

Leadership

Everyone at THA, the Board, management and staff, shares the leadership it will take to extend these values throughout THA's work, to fulfill the mission and to advance the vision for our city.



TACOMA HOUSING AUTHORITY

Strategic Objectives

Amended by the THA Board: February 27, 2013

Housing and Supportive Services

THA will provide high quality housing, rental assistance and supportive services. Its supportive services will help people succeed as tenants, parents, students, wage earners and builders of assets who can live without assistance. It will focus this assistance to meet the greatest need.

Housing and Real Estate Development

THA will efficiently develop housing and properties that serve primarily families and individuals unable to find the affordable and supportive housing they need. Its work will promote the community's development. Its properties will be financially sustainable, environmentally innovative, and attractive.

Property Management

THA will manage its properties so they are safe, efficient to operate, good neighbors, attractive assets to their neighborhoods and places where people want to live.

Financially Sustainable Operations

THA seeks to be more financially self-sustaining.

Environmental Responsibility

THA will develop and operate its properties in a way that preserves and protects natural resources.

Advocacy and Public Education

THA will advocate for the value of its work and for the interests of the people it serves. It will be a resource for high quality advice, data and information on housing, community development, and related topics. THA will do this work at the local, state and national levels.

Administration

THA will have excellent administrative systems. Its staff will have skills that make THA highly efficient and effective in the customer service it provides to the public and among its departments. It will provide a workplace that attracts, develops and retains motivated and talented employees.



TACOMA HOUSING AUTHORITY

THA PERFORMANCE MEASURES for STRATEGIC OBJECTIVES
[Adopted by THA Board: February 27, 2013]

and

DRAFT BASELINE AND TARGETS FOR PERFORMANCE MEASURES
DRAFT STRATEGIES
DRAFT PERFORMANCE MEASURES FOR STRATEGIES

February 24, 2016
With further edits

Tacoma Housing Authority
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1. HOUSING AND SUPPORTIVE SERVICES

THA will provide high quality housing, rental assistance and supportive services. Its supportive services will help people succeed as tenants, parents, students, wage earners, and builders of assets who can live without assistance. It will focus this assistance to meet the greatest need.

Performance Measures: Housing and Supportive Services Strategic Objective									
1.1 NUMBER OF PEOPLE AND HOUSEHOLDS SERVED									
1.1.1 INCREASE NUMBER OF HOUSEHOLDS AND PERSONS RECEIVING THA HOUSING OR RENTAL ASSISTANCE									
THA Tenants (including all properties that THA owns or manages and project based voucher tenants in THA properties)									
		2013 Baseline	Target	Result to date	2013 Baseline	Target	Result to date	2013 Baseline	Target
# of households	1,164	1,500		3,605	3,796		4,769	5,296	
# of persons	1,835	2,370		9,515	9,600		11,350	11,970	

Performance Measures: Housing and Supportive Services Strategic Objective

1.2 SERVING THE NEEDIEST

1.2.1

VARIOUS INCOME LEVELS FOR TACOMA HOUSEHOLDS

NOTE: These data are not performance measures. They provide a comparison for THA's household income.

VARIOUS INCOME LEVELS FOR TACOMA HOUSEHOLDS						
Jurisdiction	Median Income	Average Household Size	Federal Poverty Line	30% Median Income	50% Median Income	80% Median Income
Pierce County*	\$59,711	2.64	\$19,530 (3 people)	\$17,913	\$30,150	\$48,250
City of Tacoma*	\$51,269	2.49	\$19,530 (3 people)	\$15,151	\$25,252	\$40,402
HUD 2013 Published Tacoma-Pierce County Income	\$70,200	4	\$23,550 (4 people)	\$24,250	\$35,450	\$56,700
2013 HUD Published Income Limits by Household Size and Income Level						
	1 person	2 people	3 people	4 people	5 people	6 people
Extremely Low Income 30% AMI	\$14,750	\$16,850	\$18,950	\$21,050	\$22,750	\$24,450
Very Low Income 50% AMI	\$24,600	\$28,100	\$31,600	\$35,100	\$37,950	\$40,750
Low Income 80% AMI	\$39,350	\$44,950	\$50,500	\$56,150	\$60,650	\$65,150

* US Census Quick Facts

Performance Measures: Housing and Supportive Services Strategic Objective

1.2.2

INCOME AND EARNED INCOME OF HOUSEHOLDS PARTICIPATING IN ALL THA HOUSING PROGRAMS

These data are not performance measures. (If these income levels are low that might denote success at focusing on the neediest, or lack of success in helping them prosper.) Instead, these data give context to the performance measures in the following sections.

TOTAL INCOME (EARNED AND UNEARNED) OF HOUSEHOLDS PARTICIPATING IN ALL THA HOUSING PROGRAMS

	Average Income	% of Pierce County Median Income (\$59,711)	% of City of Tacoma Median Income (\$51,269)		Median Income	% of Pierce County Median Income (\$59,711)	% of City of Tacoma Median Income (\$51,269)
Seniors/Disabled	\$12,110	20%	24%		\$9,756	16%	19%
Other	\$13,950	23%	27%		\$11,656	20%	23%
All Households	\$13,225	22%	26%		\$10,074	17%	20%

During the April 23rd Cabinet meeting, the group agreed to change the term “Work-Able” to “Other.” This will allow us to account for the varying degrees of work-ability and work-readiness that currently exists within that group. In addition, when Community Services selects and begins implementing some form of Self-Sufficiency Matrix scoring tool, those categories will be added here as well.

Performance Measures: Housing and Supportive Services Strategic Objective

1.2.3

EMPLOYABILITY OF THA HOUSEHOLDS

These data are not performance measures. We currently designate households as senior/disabled if they receive disability benefits, or work-able if they do not. However, we are finding that just because a household is not receiving disability income, does not mean they are work-able. We wish to understand our population better by eventually eliminating the term work-able, and replacing it with additional categories. This will also help us ensure that each household is receiving appropriate services.

EMPLOYABILITY AT A POINT IN TIME		
	Number of Households	% of Total Households
Disabled Elderly	739	15.54%
Disabled Not Elderly	1,631	34.29%
Elderly Not Disabled	281	5.91%
Other	2,106	44.27%

During the April 23rd Cabinet meeting, the group agreed to change the term “Work-Able” to “Other.” This will allow us to account for the varying degrees of work-ability and work-readiness that currently exists within that group. In addition, when Community Services selects and begins implementing some form of Self-Sufficiency Matrix scoring tool, those categories will be added here as well.

1.2.4 DEMOGRAPHICS OF THA'S CLIENTS AT THEIR ENTRY TO THA FUNDED PROGRAMS [includes all households receiving THA assistance, whether directly or from another organization that THA funds.]	DEMOGRAPHICS OF THA'S CLIENTS AT THEIR ENTRY TO THA FUNDED PROGRAMS [includes all households receiving THA assistance, whether directly or from another organization that THA funds.]						
	% of Low-Income Pop. of City N=80,520	Number of Households			% of Total Households		
The income band data for this table uses individual household size and income compared to the 2013 HUD-published Tacoma-Pierce County income limits by household size.		2013 Baseline	Target	Results to Date	2013 Baseline	Target	Results to Date
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN ALL THA HOUSING PROGRAMS:							
Income Bands							
$\leq 30\%$ AMI	36%	559			88%		
$> 30\% \text{ and } \leq 50\%$ AMI	33%	71			11%		
$> 50\% \text{ and } \leq 80\%$ AMI	31%	5			1%		
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN THE HOUSING CHOICE VOUCHER PROGRAM (2012):	Note: Housing Choice Voucher numbers have been included for reference only. We used baseline numbers from 2012 rather than 2013 because that was the last full year cohort. We have not included targets for this program because we are no longer admitting new households to this program.						
$\leq 30\%$ AMI		130			84%		
$> 30\% \text{ and } \leq 50\%$ AMI		21			14%		
$> 50\% \text{ and } \leq 80\%$ AMI		3			2%		
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN HOP:							
$\leq 30\%$ AMI		158	158		86%	86%	
$> 30\% \text{ and } \leq 50\%$ AMI		27	27		14%	14%	
$> 50\% \text{ and } \leq 80\%$ AMI		0	0		0%	0%	
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN SPECIAL VOUCHER PROGRAMS*:	*Special Voucher Programs: FUP, Homeownership, McCarver and VASH.						
$\leq 30\%$ AMI		59	59		93%	93%	
$> 30\% \text{ and } \leq 50\%$ AMI		5	5		7%	7%	
$> 50\% \text{ and } \leq 80\%$ AMI		0	0		0%	0%	

		DEMOGRAPHICS OF THA'S CLIENTS AT THEIR ENTRY TO THA FUNDED PROGRAMS (Cont'd)					
		<i>[includes all households receiving THA assistance, whether directly or from another organization that THA funds.]</i>					
		Number of Households			% of Total Households		
		2013 Baseline	Target	Results to Date	2013 Baseline	Target	Results to Date
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN PUBLIC HOUSING: Income Bands							
	$\leq 30\%$ AMI	158	158		84%	84%	
	$> 30\% \text{ and } \leq 50\%$ AMI	22	22		12%	12%	
	$> 50\% \text{ and } \leq 80\%$ AMI	5	5		3%	3%	
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN THA-OWNED PROJECT BASED VOUCHERS (Hillside and Salishan): Income Bands							
	$\leq 30\%$ AMI	67	67		81%	81%	
	$> 30\% \text{ and } \leq 50\%$ AMI	16	16		19%	19%	
	$> 50\% \text{ and } \leq 80\%$ AMI	0	0		0%	0%	
HOUSEHOLD INCOME AT THE START OF PARTICIPATION IN PARTNER-OWNED PROJECT BASED VOUCHERS: Income Bands							
	$\leq 30\%$ AMI	116	116		98%	98%	
	$> 30\% \text{ and } \leq 50\%$ AMI	2	2		2%	2%	
	$> 50\% \text{ and } \leq 80\%$ AMI	0	0		0%	0%	
STATUS OF HOUSEHOLDS AT THE START OF PARTICIPATION IN HOUSING PROGRAM							
	Homeless families with children (FIT [16], MCAR [8], RR [25], FUP [11], CHOP [0], CHAP [0])	60	TBD		9%	TBD	
	Homeless adults without children (PBV-Nativity House)	18	TBD		3%	TBD	
	Homeless young adults(RR [36], CHOP [0], CHAP [0])	36	TBD		5%	TBD	
	Homeless veterans (VASH)	51	TBD		8%	TBD	
	Persons coming out of corrections	0	0		0	0	

CHOP: Child Housing Opportunity Program
FIT: Families in Transition
FUP: Family Unification Program (Families whose children have been removed by CPS and need housing to get them back.)
MCAR: McCarver Special Housing Program
PBV: Project Based Vouchers in homeless housing projects
RR: Rapid Re-Housing through Pierce County
VASH: Veterans Administration Supportive Housing tenant based and project based vouchers

This table reports the new admissions during the year that were admitted into programs designated for homeless households.

1.3 CHANGES IN EARNED INCOME AND ASSET ACCUMULATION

1.3.1 CHANGE IN EARNED INCOME OF NON-SENIOR/DISABLED THA HOUSEHOLDS.

Entry: Earned Income as dollar value and % HUD AMI at the start of THA program

Exit: Earned Income as dollar value and as % of HUD AMI upon exiting THA program

Δ: Change in earned income from entry to exit/ Change in Income

LOS: Average Length of Stay in THA program for all households exiting THA programs in the reporting year.

(a) ANNUAL AVERAGE AND MEDIAN CHANGES IN INCOME OVER TIME
This table will reflect the average income of households for the given year based on the length of stay on the program.

	Average Income						Median Income					
	2016/0	2016/1	2016/2	2016/3	2016/4	2016/5	2016/0	2016/1	2016/2	2016/3	2016/4	2016/5
Community Services	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
HOP (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
Voucher (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
Portfolio (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
All THA												

(b) AVERAGE CHANGE IN EARNED INCOME OF NON-SENIOR/DISABLED THA HOUSEHOLDS
This table will reflect the average change in income for all households exiting out programs in a given year.

	Baseline				Target				Results to Date			
	Entry	Exit	Δ	LOS	Entry	Exit	Δ	LOS	Entry	Exit	Δ	LOS
Community Services	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
HOP (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
Voucher (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
Portfolio (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
ALL THA												

(c) MEDIAN CHANGE IN EARNED INCOME OF NON-SENIOR/DISABLED THA HOUSEHOLDS
This table will reflect the median change in income for all households exiting out programs in a given year.

	Baseline				Target				Results to Date			
	Entry	Exit	Δ	LOS	Entry	Exit	Δ	LOS	Entry	Exit	Δ	LOS
Community Services	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
HOP (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
Voucher (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
Portfolio (non CS)	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD				
ALL THA	\$14,142/ 28%	\$16,004/ 32%	\$0	1.91	N/A	\$30,302 60%	\$16,160	5				

We do not currently have a reliable or efficient way to track Community Services vs. Non-Community Services Clients. This will be incorporated into Salesforce.

1.3.2 BANKING PRACTICES OF THA TENANTS AND CLIENTS	% THA Tenants and Clients that are Fully Banked									
	% Banked At Lease-Up			% Banked after One Year of Housing Assistance			% Banked after more than One Year of Housing Assistance			
	2013 Baseline	Target	Current Year	2013 Baseline	Target	Result to date	2013 Baseline	Target	Result to date	
Community Services	TBD	N/A		TBD	5% Increase		TBD	80%		
HOP (non CS)	TBD			TBD			TBD			
Voucher (non CS)	TBD			TBD			TBD			
Portfolio (non CS)	TBD			TBD			TBD			
All THA	TBD			TBD			TBD			

1.3.3 EMPLOYMENT STATISTICS FOR COMMUNITY SERVICES CLIENTS	EMPLOYMENT STATISTICS FOR EMPLOYED COMMUNITY SERVICES CLIENTS							
		AT START OF CS PROGRAM			AT EXIT FROM CS PROGRAM			
		Baseline	Target	Results to Date	Baseline	Target	Results to Date	
This is new data that we will begin collecting this year.	Employed	TBD	N/A		TBD*	TBD		
	% Working in Regular Positions	TBD	N/A		TBD	TBD		
	% Working Full Time	TBD	N/A		TBD	TBD		
	% Receiving Employer Benefits (Paid time off, and/or health insurance)	TBD	N/A		TBD	TBD		
	% Earning at least <u>Housing Wage</u> for Tacoma	TBD	N/A		TBD	TBD		
	Zero-Bedroom \$13.25							
	One-Bedroom \$16.13							
	Two-Bedroom \$21.02							
	Three-Bedroom \$30.98							
	Four-Bedroom \$37.23							

* Many people in the baseline cohort have not exited yet. Also, we will need to work on data quality to ensure accuracy.

1.3.4**EMPLOYMENT
STATISTICS FOR ALL
WORKABLE
HOUSEHOLDS**

This is new data that we will begin collecting this year.

EMPLOYMENT STATISTICS FOR ALL WORKABLE HOUSEHOLDS						
	AT START OF CS PROGRAM			AT EXIT FROM CS PROGRAM		
	Baseline	Target	Results to Date	Baseline	Target	Results to Date
Employed	TBD	N/A		TBD*	TBD	
% Working in Regular Positions	TBD	N/A		TBD	TBD	
% Working Full Time	TBD	N/A		TBD	TBD	
% Receiving Employer Benefits (Paid time off, and/or health insurance)	TBD	N/A		TBD	TBD	
% Earning at least <u>Housing Wage</u> for Tacoma	TBD	N/A		TBD	TBD	
Zero-Bedroom \$13.25						
One-Bedroom \$16.13						
Two-Bedroom \$21.02						
Three-Bedroom \$30.98						
Four-Bedroom \$37.23						

* Many people in the baseline cohort have not exited yet. Also, we will need to work on data quality to ensure accuracy.

1.4 EDUCATIONAL OUTCOMES

1.4.1

CHANGES IN SCHOOL ACHIEVEMENT OF THA STUDENTS (THA tenants and voucher participants)

We are adding capacity through a Gates grant to create an Education Analyst position to work on this project. We anticipate bringing this person on board in July or August. This data should be available in October or November.

Entry: Lease Up

Exit: When THA assistance ends

EE Δ: Change from Entry to Exit

1YR Δ: Median Annual Change

SCHOOL PERFORMANCE OF STUDENTS IN TACOMA AND THA STUDENTS									
[These data are not THA performance measures. They provide context and baselines for the performance measures in 1.4.1 below.]									
	WA State	All TPS	Low Income TPS	Tacoma McKinney -Vento	Special Housing Program	CSA Grades K-5	CSA Grades 6-12	THA Other	
% at Grade Level for Reading	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	
% at Grade Level for Math	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	
High School Graduation Rates	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	
% With Chronic Absenteeism	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	
% With Discipline Incidents	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	

CHANGE IN SCHOOL ACHIEVEMENT FOR THA STUDENTS														
	Baseline				Target				Results to Date					
	Entry	Exit	EE Δ	1YR Δ	Entry	Exit	EE Δ	1YR Δ	Entry	Exit	EE Δ	1YR Δ		
% READING AT GRADE LEVEL	TBD	TBD	TBD	TBD	N/A	> Entry		+ 5%						
% MATH AT GRADE LEVEL	TBD	TBD	TBD	TBD	N/A									
% WITH CHRONIC ABSENTEEISM	TBD	TBD	TBD	TBD	N/A	< Entry		- 5%						
% WITH DISCIPLINE INCIDENTS	TBD	TBD	TBD	TBD	N/A									
Baseline					Target				Results to Date					
HS GRADUATION RATES					TBD				TBD					

1.4.1 CONTINUED
CHANGES IN SCHOOL
ACHIEVEMENT OF
THA STUDENTS
(THA tenants and voucher participants)

We are adding capacity through a Gates grant to create an Education Analyst position to work on this project. We anticipate bringing this person on board in July or August. This data should be available in October or November.

The data in this table will be compared to control groups such as all TPS students, all TPS low-income students, etc.

CHANGES IN SCHOOL ACHIEVEMENT FOR THA STUDENTS DURING STAY IN THA HOUSING							
[These data are not THA performance measures. They provide context and baselines for the performance measures in 1.4.1 above.]							
% READING AT GRADE LEVEL	After 1 Year	After 2 Years	After 3 Years	After 4 Years	After 5 Years	> 5 Years	At Exit
Elementary School Housing Program	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades K-5	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades 6-12	TBD	TBD	TBD	TBD	TBD	TBD	TBD
THA Other	TBD	TBD	TBD	TBD	TBD	TBD	TBD
% MATH AT GRADE LEVEL	After 1 Year	After 2 Years	After 3 Years	After 4 Years	After 5 Years	> 5 Years	At Exit
Elementary School Housing Program	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades K-5	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades 6-12	TBD	TBD	TBD	TBD	TBD	TBD	TBD
THA Other	TBD	TBD	TBD	TBD	TBD	TBD	TBD
HIGH SCHOOL GRADUATION RATES	After 1 Year	After 2 Years	After 3 Years	After 4 Years	After 5 Years	> 5 Years	At Exit
Elementary School Housing Program	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades K-5	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades 6-12	TBD	TBD	TBD	TBD	TBD	TBD	TBD
THA Other	TBD	TBD	TBD	TBD	TBD	TBD	TBD
% WITH CHRONIC ABSENTEEISM	After 1 Year	After 2 Years	After 3 Years	After 4 Years	After 5 Years	> 5 Years	At Exit
Elementary School Housing Program	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades K-5	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades 6-12	TBD	TBD	TBD	TBD	TBD	TBD	TBD
THA Other	TBD	TBD	TBD	TBD	TBD	TBD	TBD
% WITH DISCIPLINE INCIDENTS	After 1 Year	After 2 Years	After 3 Years	After 4 Years	After 5 Years	> 5 Years	At Exit
Elementary School Housing Program	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades K-5	TBD	TBD	TBD	TBD	TBD	TBD	TBD
CSA Grades 6-12	TBD	TBD	TBD	TBD	TBD	TBD	TBD
THA Other	TBD	TBD	TBD	TBD	TBD	TBD	TBD

1.4.2

CHANGE IN ADULT EDUCATIONAL ATTAINMENT WITH REGARD TO EMPLOYMENT FOR NON SENIOR/DISABLED HOUSEHOLDS
(THA tenants and voucher participants)

* The data source for this information has too much incomplete data. We will need to begin collecting this data this year to have meaningful data.

CHANGE IN ADULT EDUCATIONAL ATTAINMENT (NON SENIOR/DISABLED)						
CS Clients	Adult Education Levels at Entry			Adult Education Levels at Exit		
	Baseline	Target	Results to Date	Baseline	Target	Results to Date
Less than High School	TBD	N/A		TBD	TBD	
High School Diploma or GED	TBD	N/A		TBD	TBD	
Some Post-Secondary	TBD	N/A		TBD	TBD	
Vocational/Technical Certificate	TBD	N/A		TBD	TBD	
Associates Degree	TBD	N/A		TBD	TBD	
Bachelor's Degree	TBD	N/A		TBD	TBD	
Graduate or Professional Degree	TBD	N/A		TBD	TBD	
Non-CS THA Clients	Adult Education Levels at Entry			Adult Education Levels at Exit		
	Baseline	Target	Results to Date	Baseline	Target	Results to Date
Less than High School	TBD	N/A		TBD	TBD	
High School Diploma or GED	TBD	N/A		TBD	TBD	
Some Post-Secondary	TBD	N/A		TBD	TBD	
Vocational/Technical Certificate	TBD	N/A		TBD	TBD	
Associates Degree	TBD	N/A		TBD	TBD	
Bachelor's Degree	TBD	N/A		TBD	TBD	
Graduate or Professional Degree	TBD	N/A		TBD	TBD	
ADULT EDUCATIONAL ATTAINMENT AND INCOME						
<i>[These data are not THA performance measures. They provide context and baselines for the performance measures in 1.4.2 above.]</i>						
	25 and Older City of Tacoma (N=138,098)		≤125% Poverty Level City of Tacoma, 25 and Older (N=23,549)		Median Income 25 and Older City of Tacoma (N=138,098)	
Less than High School	13.1%		25.9%		\$24,425	
High School Diploma or GED	25.5%		32.2%		\$30,312	
Some Post-Secondary	25.5%		33.4%	\$36,665		
Vocational/Technical Certificate	N/A					
Associates Degree	9.5%					
Bachelor's Degree	17.0%				\$48,938	
Graduate or Professional Degree	9.4%		8.5%	\$56,370		

1.5 QUALITY OF LIFE AND ACCESS TO COMMUNITY ASSETS

1.5.1 % OF SENIOR AND DISABLED HOUSEHOLDS ENGAGING IN SERVICES AND PROGRAMMING

This is new data that we will begin collecting this year.

(a) % OF SENIOR AND DISABLED HOUSEHOLDS ENGAGING IN SERVICES AND PROGRAMMING					
SERVICE/PROGRAM/ACTIVITY	Baseline	Target	Results to Date		
Chronic Health Conditions Management	TBD	TBD			
Community Gardens	TBD	TBD			
Engaged with a Primary Care Provider	TBD	TBD			
Food Programs	TBD	TBD			
Tenant Meetings	TBD	TBD			
Usage of External Providers (Pierce County Aging and Disability Resources)	TBD	TBD			

(b) LEASE COMPLIANCE

	Number of Households			% of Households		
	Baseline	Target	Results to Date	Baseline	Target	Results to Date
Referred for lease violations	TBD	TBD		TBD	TBD	
Engaged in services to fix lease violations	TBD	TBD		TBD	TBD	
Achieved lease compliance	TBD	TBD		TBD	TBD	

1.5.2 % OF THA HOUSEHOLDS LIVING IN HIGH OPPORTUNITY AREAS

This is new data that we will begin collecting this year.

The definition and geographic scope of “high opportunity” are still being discussed internally.

% of HOUSEHOLDS THAT LIVE IN HIGH OPPORTUNITY AREAS			
THA PROGRAM	Baseline	Target	Results to Date
HOP	TBD	TBD	
TRADITIONAL VOUCHERS	TBD	TBD	
PORTFOLIO	TBD	TBD	

1.5.3**CLIENT SERVICES
CLIENT SATISFACTION**

Client Services will develop a client satisfaction survey in 2016 that will be administered at exit from Community Services and Rental Assistance. The results of that survey will be reported here.

1.6 COST PER HOUR OF DIRECT SERVICE AND VALUE OF COMMUNITY SERVICES INVESTMENTS**1.6.1****COST PER HOUR OF
DIRECT SERVICE**

THA seeks to understand the value of its investments in supportive services.

Calculating the cost per hour of direct service will allow us to calculate that value by applying the cost per hour of direct service to various client outcomes. We can also compare our costs to other similar service providers.

This is new data that we will begin collecting this year.

COST PER HOUR OF DIRECT SERVICE			
	Baseline	Target	Results to Date
THA Cost Per Hour of Direct Service	TBD	TBD	TBD
Comparison Agency 1	TBD	TBD	TBD
Comparison Agency 2	TBD	TBD	TBD

**1.6.2
COST TO CS ACHIEVE
CLIENT OUTCOMES**

This is new data that we will begin collecting this year.

COST TO ACHIEVE CS CLIENT OUTCOMES			
	Baseline	Target	Results to Date
Obtaining Full Time, Housing Wage Employment with Benefits	TBD	TBD	TBD
Securing Disability Benefits	TBD	TBD	TBD
Increase in SSM Scores by 1	TBD	TBD	TBD
Successful Exit	TBD	TBD	TBD

**1.6.3
VALUE OF EVICTIONS
AVERTED**

This is new data that we will begin collecting this year.
This measure is dependent upon calculating the cost per hour of direct service.

VALUE OF EVICTIONS AVERTED THIS YEAR					
	# OF TENANTS	PERCENT OF EVICTIONS AVERTED	GROSS SAVINGS	LESS DIRECT SERVICE COST	
TENANTS REFERRED TO COMMUNITY SERVICES FOR HARSHSHIP	TBD	TBD	TBD	TBD	
TENANTS ENGAGED WITH COMMUNITY SERVICES FOR HARSHSHIP (N=20)	TBD	TBD	TBD	TBD	
TENANTS REFERRED TO COMMUNITY SERVICES FOR CASE STAFFING	TBD	TBD	TBD	TBD	
TENANTS ENGAGED WITH COMMUNITY SERVICES FOR CASE STAFFING (N=12)	TBD	TBD	TBD	TBD	
TOTAL COMPLETED HARSHSHIP OR CASE STAFFING (N=32)	TBD	TBD	TBD	TBD	

2. HOUSING AND REAL ESTATE DEVELOPMENT STRATEGIC OBJECTIVE

THA will efficiently develop housing and properties that serve primarily families and individuals unable to find affordable and supportive housing they need. Its work will serve will promote the community's development. Its properties will be financially sustainable, environmentally innovative, and attractive.

Performance Measures: Housing and Real Estate Development Strategic Objective			
2.1 SIZE AND QUALITY OF THA's PORTFOLIO OF PROPERTY AND WHOM IT SERVES			
2.1.1 NUMBER AND TYPE OF THA UNITS	NUMBER AND TYPE OF THA UNITS		
	Total Number of Units	Baseline	Target
	Total Number of Units	1,335	Add 70 units per year
	Units affordable and reserved for households at these income:		
	• ≤ 30% AMI	1,071(80%)	TBD
	• 30% to 50% AMI	216(6%)	TBD
	• 51% to 60% AMI	48(4%)	TBD
	• 61% to 80% AMI	?	TBD
	Units with these # of bedrooms		
	• Studios	0	
• 1 BR	449(38%)	Add 27	
• 2 BR	305 (26%)	add 29	
• 3 BR	359(30%)	add 14	
• 4 BR	50(4%)		
• 5 +BR	24(2%)		

Performance Measures: Housing and Real Estate Development Strategic Objective

**2.1.2
THE TOTAL NUMBER
OF UNIT-YEARS IN
THA'S PORTFOLIO.**

NOTE: The unit-years for a property denotes the number of units in the property multiplied by the years of service that the property will provide at the standards of quality THA seeks for its properties without needing funds beyond its ordinary maintenance budget and the replacement reserves assigned to that property.

NOTE: THA can increase its total unit-years in various ways. It can build or buy new units or rehabilitate old ones. Its total unit-years can decrease by an unaddressed decline in the condition of a property, or by a sale of a property.

TOTAL NUMBER OF UNIT-YEARS IN THA'S PORTFOLIO		
Baseline	Target	Results to Date
TBD as part of the RAD conversion and in consultation with a similar definition being developed by the WSHFC	?	?

Performance Measures: Housing and Real Estate Development Strategic Objective					
2.1.3 RECOGNITION, AWARDS, DESIGNATIONS]	RECOGNITION, AWARDS, DESIGNATIONS]				
		Baseline	Target	Results to Date	
	Design	5 Design Awards	1 Per New Project		
	Affordability	1 Award	1 Per New Development		
2.2 EFFICIENCY OF THA'S REAL ESTATE DEVELOPMENT	Construction Innovation	1 Award	1 Per New Development		
	COST EFFICIENCY OF DEVELOPMENT				
		Standards		Baselines	Targets
		WSHFC	Housing Trust Fund		Results to Date
2.2.2 COST OF UNIT YEARS	Average cost per square foot	\$123.32	\$123.32	\$225.09	Meet TDC
	COST EFFICIENCY OF UNIT YEARS				
		Standards		Baselines	Targets
		WSHFC	Housing Trust Fund		Results to Date
	Average cost per unit year	TBD	TBD	TBD	TBD
	These standards are still being developed by the Washington State Housing Finance Commission (WSHFC) and the State Housing Trust Fund (HTF).				

Performance Measures: Housing and Real Estate Development Strategic Objective

2.2.3 DEVELOPMENT COSTS LEVERAGE RATIO

NOTE:

THA Contribution to
Development Costs

Total Development Costs

DEVELOPMENT COSTS LEVERAGE RATIO

Baseline	Target	Results to Date
\$9.3 to \$1	\$10 to \$1	

2.3 ASSISTING DEVELOPMENT OF AFFORDABLE HOUSING BY OTHER ORGANIZATIONS

2.3.1 ASSISTING DEVELOPMENT OF HOUSING FOR OTHER ORGANIZATIONS

The number of affordable square feet, housing units and Class B or better developments that THA helped other organizations to finance or develop or fix-up.

ASSISTING DEVELOPMENT OF HOUSING FOR OTHER ORGANIZATIONS

	Baseline in Units	Target	Results to Date
Development Services	15	Average 40 every two years.	

3. PROPERTY MANAGEMENT

THA will manage its properties so they are safe, efficient to operate, good neighbors, attractive assets to their neighborhoods and places where people want to live.

Performance Measures: Property Management Strategic Objective			
3.1 EFFICIENCY OF THA'S PROPERTY MANAGEMENT			
3.1.1 OPERATING COSTS PER UNIT PER YEAR (PUPY)	OPERATING COSTS PER UNIT PER YEAR (PUPY)		
	Baselines	Targets	Results to Date
	6 th Ave	\$5906	\$5900
	Fawcett	\$7711	\$5900
	K Street	\$6727	\$5900
	Ludwig	\$5755	\$5900
	M Street	\$6954	\$5900
	G Street	\$6346	\$5900
	Wright Street	\$5519	\$5900
	Bergerson Terrace	\$7146	\$5900
	Dixon Village	\$8495	\$5900
	Bay Terrace	\$3743	\$6050
	Hillside 1500	\$8724	\$6250
	Hillside Phase I	\$6448	\$6100
	Hillside Phase II	\$8253	\$6100
	Salishan 1	\$6413	\$7150
	Salishan 2	\$6003	\$7100
	Salishan 3	\$6215	\$6800
	Salishan 4	\$7133	\$6950
	Salishan 5	\$7625	\$7000
	Salishan 6	\$6724	\$6950
	Salishan 7	\$6971	\$7250
	Aggregate Average	\$6749	\$6505

3.1.2**RENT COLLECTED AS % OF MAXIMUM RENT CHARGED**

RENT COLLECTED AS % OF MAXIMUM RENT CHARGED			
	Baselines	Targets	Results to Date
Entire Portfolio	95%	95%	
6 th Ave		95%	
Fawcett	98%		
K Street	97%		
Ludwig	97%		
M Street	96%		
G Street	98%		
Wright Street	99%		
Bergerson Terrace	97%		
Dixon Village	97%		
Bay Terrace	86%		
Hillside 1500	91%		
Hillside Phase I	99%		
Hillside Phase II	94%		
Salishan 1	97%		
Salishan 2	96%		
Salishan 3	97%		
Salishan 4	98%		
Salishan 5	89%		
Salishan 6	91%		
Salishan 7	92%		

**3.1.3
OPERATING WITHIN
BUDGET**

Properties operating within percent of annual budget

*Debt Service Coverage Ratio (DCSR) is the amount of cash flow available to meet annual interest and principle payments (debt) on the property. It is calculated by dividing net operating income by debt service.

NET CASH FLOW			
	Baselines	Targets	Results to Date
Entire Portfolio	TBD: We will use 2015 as the baseline year	We will use a 1.6 DSCR* as proposed by 3 rd party consultant.	
6th Ave	TBD: We will use 2015 as the baseline year	No more than 105% of annual budget	
Fawcett			
K Street			
Ludwig			
M Street			
G Street			
Wright Street			
Bergerson Terrace			
Dixon Village			
Bay Terrace			
Hillside 1500			
Hillside Phase I			
Hillside Phase II			
Salishan 1			
Salishan 2			
Salishan 3			
Salishan 4			
Salishan 5			
Salishan 6			
Salishan 7			

3.1.4**LENGTH OF TIME TO RE-RENT A VACANT UNIT**

This includes the number of days that elapse between receiving keys from a vacating tenant and providing keys to a new tenant.

LENGTH OF TIME TO RE-RENT A UNIT		
Baseline (portfolio average)*	Target*	Results to Date
40 days	20 days or less	

*The baselines and targets applies to non-meth contaminated units.

3.2 QUALITY OF THA's PROPERTIES**3.2.1****RATING OF THA's PORTFOLIO**

NOTE: Class B properties have a 15 to 30 year remaining useful life in all major building systems

NOTE: These measures denote physical condition of the property, amenities, age of building and location. A Class B or better designation shows a longer useful life, more amenities and ability to command higher rents.

RATING OF THA's PORTFOLIO		
Baseline	Target	Results to Date
Baseline will be determined after completion of Capital Needs	100% of THA properties at an average B Level Rating or Better	

3.2.2**SCHEDULING AND MEETING CAPITAL NEEDS**

An assessment of the number of capital items identified for repair based on a reserve for replacement schedule compared to the number of those items actually replaced annually per the schedule.

PERCENT OF SCHEDULED CAPITAL NEEDS COMPLETED ON AN ANNUAL BASIS			
	Baselines	Targets	Results to Date
Entire Portfolio <i>[each property]</i>	Properties will be added to this table individually as they are converted to RAD and rehab is completed.	?	?

3.3 TENANT ENGAGEMENT AND LEASE ENFORCEMENT

3.3.1

SURVEY OF RESIDENTS OR A SAMPLING OF RESIDENTS ON THEIR RATING OF THE FOLLOWING ON A SCALE OF 1 TO 5

SURVEY OF THA TENANTS (AVERAGE FOR THE PORTFOLIO)			
	Baselines	Targets	Results to Date
How do you feel about how you've been treated by THA Staff?	4.22	Any rating below 4.5 has a 10% increase. Any rating above 4.5, maintains a rating above 4.5.	
How quick does THA staff take care of your requests?	3.48		
How satisfied are you with how THA staff responds to your requests?	3.7		
How quick does THA return your phone call?	3.6		
How safe from crime do you feel in your THA community?	3.59		
How safe from crime do you feel in your neighborhood?	3.48		
How quick does THA fix broken things in your home?	3.45		
How well does THA fix broken things in your home?	3.99		
Would you recommend THA to a friend that needed housing?	4.7		

3.3.2 CUSTOMER CONSULTATION

Solicit and respond to public comments on policy and/or practice changes and funding applications that directly impact tenants

PERCENTAGE OF TIME THA CONSULTS WITH CUSTOMERS IN ADVANCE OF CHANGES		
Baseline	Target	Results to Date
100%	100%	

3.3.3 EVICTION RATE

A comparison of THA's eviction rate as compared to the private market

THA's EVICTION RATE COMPARED TO THE PRIVATE RENTAL MARKET			
	Baseline	Target	Results to Date
Private Market	TBD		
THA Portfolio	TBD. Will be established from 2015 evictions	Reduce by 5%	TBD

4. FINANCIALLY SUSTAINABLE OPERATIONS

THA seeks to be more financially self-sustaining.

Performance Measures: Financial Sustainable Operations Strategic Objective				
4.1 FINANCIAL MANAGEMENT				
4.1.1 OPERATING SURPLUS/DEFICIT	OPERATING URPL S/DEFICIT			
	Baselines	Targets	Results to Date	
	Balance of Recurring operating expenses and recurring income	Balance	Surplus	?
• Recurring operating expenses vs. recurring incomes				
• End of year variance to budget	End of year variance from budget	Income: 3% variance. Expense: 5% variance in 2012	Actuals within 10% of budget	?
4.1.2 RESERVES	RESERVES			
	Baselines		Targets	
	Minimum	Maximum	Minimum	Maximum
Minimum and Maximum				
• Operating reserves: number of months of operating cash available	\$2,640,833		\$2,640,833	TBD
• MTW Reserves	\$5.25 million		1 month expense	TBD
• Non-MTW Reserves	\$5.75 million		\$ 2 million	TBD

DEBT SERVICE RATIO			
	Baseline	Target	Results to Date
Total income			
Total current liabilities	2.23	1.15	
VALUE OF THA'S LAND and PROPERTY			
	Baselines	Targets	Results to Date
Average value per housing unit	\$153,018	\$153,018	
Total value of all land and property	\$191,578,854	\$191,578,854	
CHANGE IN INCOME			
Income Relative to Prior Years	Baselines	Targets	Results to Date
Total Income	\$45.2 million	5% increase yearly	
Total MTW Operating Income	\$41.4 million	5% increase yearly	
Total Non-MTW Operating Income	\$3.8 million	5% increase yearly	

4.2 EARNING MONEY

4.2.1 NON-HUD INCOME GENERATION

NON-HUD INCOME GENERATION			
	Baselines	Targets	Results to Date
OPERATING INCOME: $\frac{\text{Non-HUD Operating Income}}{\text{Total Operating Income}} \times 100$	14.4%	?	
TOTAL INCOME: $\frac{\text{Non-HUD Income}}{\text{Total Income}} \times 100$	12.2%	?	

5. ENVIRONMENTAL RESPONSIBILITY

THA will develop and operate its properties in a way that preserves and protects natural resources

Performance Measures: Environmental Responsibility Strategic Objective			
5.1 GREEN REAL ESTATE DEVELOPMENT			
5.1.1 DEVELOP ENVIRONMENTALLY RESPONSIBLE PROPERTIES	DEVELOP ENVIRONMENTALLY RESPONSIBLE PROPERTIES		
	Baseline	Target	Results to Date
	Meet LEED silver or higher requirements in new development	Portions of Salishan and BT Meet LEED/Evergreen	New Development Meet LEED Silver Requirements
THA's new developments meet the evergreen standards	See above	100% New Development Meet Evergreen Standards	

5.1.2 CREATIVE AND HEALTHY PLACEMAKING	CREATIVE AND HEALTHY PLACEMAKING			
	Performance Measures	Baseline	Target	Results to Date
• Walking distance to parks, schools, grocery stores, jobs, public transit and other community amenities promoting health.	Meet Evergreen Standards	Bay Terrace II Salishan	All developments: Evergreen Standards	
• On-site parks, playground equipment, services, schools, community space and other amenities promoting healthy lifestyle choices.	Meet LEED Neighborhood Designation	UNK	Projects could qualify for LEED ND	

5.2 GREEN REAL ESTATE MANAGEMENT				
5.2.1 REDUCE CARBON FOOTPRINT	REDUCE CARBON FOOTPRINT			
	Baselines	Targets	Results to Date	
	TOTAL THA			
	THA will use the EPA Simplified GHG Emissions Calculator to estimate and inventory annual greenhouse gas (GHG) EMISSIONS. The methodology provided by the EPA is based on the most current Climate Leaders 1 Greenhouse Gas Inventory. This calculator determines the direct and indirect emissions from all sources as THA completes the calculator with the THA information.	Will determine following completion of EPA Simplified GHG Emissions Calculator	Reduce GHG Emissions 25% by 2035	

6. ADVOCACY and PUBLIC EDUCATION

THA will advocate for the value of THA's work and for the interests of the people it serves. It will be a resource for high quality advice, data and information on housing, community development, and related topics. THA will do this work at the local, state and national level.

Performance Measures: Advocacy and Public Education Strategic Objective

6.1 PUBLIC REGARD FOR THA

6.1.1

SURVEY OF PUBLIC PARTNERS

Personal interviews with elected officials and senior staff of the City of Tacoma, Pierce County and the elected officials and their staff for the local delegation to the Washington State legislature and the Congress;

The regard for THA's work overall and for its advocacy and public education work in particular as shown in scores from 1 to 5 and comments from the following periodic surveys

SURVEY OF PUBLIC PARTNERS		
Baseline	Target	Results to Date
4 4.1 out of 5 [for overall work]	4	4
4 out of 5 [for advocacy and public education work] [These grades are from a Survey-Monkey of stake-holders and officials, August 2011]		

6.1.2

SURVEY OF PARTNERS, FUNDERS COMMUNITY LEADER AND FRIENDS OF THA

Electronic survey of non-profit partners; funders; and community leaders and other "friends of THA". The survey will use a 1 to 5 rating of THA's work.

A FUNCTIONING ADVISORY BOARDS		
Baseline	Target	Results to Date
Not available	4	

6.2 THA AS AN EFFECTIVE ADVISOR

6.2.1 ADVISORY PANELS

THA shall be an authoritative source of advice and information for policy makers on housing and community development topics. THA's effectiveness in this work shall be evident by its appointment to most of the advisory groups convened locally on topics and by persons or groups that matter to THA.

Effectiveness of participation in these advisory groups as evidenced by (i) brief survey of the appointment authority and advisory group members to grade THA on a scale of 1 to 5, and (ii) THA's own assessment

ADVISORY PANELS			
	Baselines	Targets	Results to Date
% of Panels	90%	85%	?
Survey re Effectiveness of Participation	Not available	4 out of 5	?

6.3 THA AS EFFECTIVE ADVOCATE FOR THE VALUE OF ITS WORK AND PEOPLE IT SERVES

6.3.1 ADVOCACY EFFORTS

Participation in the local and state focused advocacy efforts affecting public policy on housing, community development, poverty and related matters.

Effectiveness of THA's participation in these efforts as evidenced by (i) brief survey of the other members of the effort for a grade on a scale of 1 to 5, and (ii) THA's own assessment.

THA's assessment of the extent of success of the advocacy efforts.

6.3.1 ADVOCACY EFFORTS			
	Baselines	Targets	Results to Date
% of Focused Advocacy in which THA Participated	70%	80%	
Survey re Effectiveness of Participation	3.8 [This is the average grade THA assigns to its efforts on recent, closed, advisory groups projects.]	4 out of 5	?
Success	4 out of 5	4 out of 5	

7. ADMINISTRATION

THA will have excellent administrative systems. Its staff will have skills that make THA highly efficient and effective in the customer service it provides to the public and among its departments. It will provide a workplace that attracts, develops and retains motivated and talented employees.

Performance Measures: Administration Strategic Objective			
7.1 AGENCY OPERATIONAL EFFICIENCY			
7.1.1 OPERATING EFFICIENCY PERCENTAGE			
		OPERATING EFFICIENCY	
		Baseline	Target
Costs of Depts. of Admin., Finance, HR and Executive	X 100	18%	18%
Total Operating Expenses			
(does not include HAP or capital expenditures)			
		ADMINISTRATIVE COSTS PER HOUSEHOLD SERVED	
		Baseline	Target
Total THA administrative budget <i>(not including housing or rental assistance)</i>		\$550 per year	\$550 per year
Total number of households served			
(THA tenants, recipients of rental assistance, from THA or THA funded partners from Annual MTW Report)			

7.1.3

HOUSEHOLD SERVED PER FTE

The number of households served by each THA Full Time Equivalent staff person:

- Total
- Tenants
- Households receiving rental assistance whether directly from THA or from an organization that THA funds.

Note that the difference between the total number of MTW HH FTE's and the total distinct households is that using the MTW definition, we may only count a funded voucher once per year even though those same funds may house multiple families throughout a given year.

HOUSEHOLD SERVED PER FTE			
	Baselines	Targets	Results to Date
MTW Total Household FTE's / THA FTE's	40.4 (4850 / 120)	40	
Total distinct Households / THA FTE's	TBD	TBD	

7.1.4

COMMUNITY SERVICE COSTS PER CLIENT

(Cost for direct service staff, contractors and cash grants)

- average cost per person receiving community services
- average cost per person in THA's employment programs gaining new or better employment

Note that this section will be TBD until we have the new system in place with the capability to track this data.

COMMUNITY SERVICE COSTS PER CLIENT			
	Baseline	Target	Results to Date
Average cost per household receiving community services	TBD	TBD	
Average cost per person receiving community services	TBD	TBD	
Total increase in earned income / cost of THA's employment programs	TBD	TBD	

7.2 STAFF PERFORMANCE AND INVESTMENTS				
7.2.1 EMPLOYEE ENGAGEMENT	EMPLOYEE ENGAGEMENT			
	Baselines	Targets	Results to Date	
Overall Score on THA Employee Engagement Survey	TBD	TBD		
Rate of Response on THA Employee Engagement Survey	91%	91%		

7.2.2 STAFF TURNOVER, ATTENDANCE RATES, AND FILED L&I CLAIMS, UNION GRIEVANCES AND CLAIMS OF DISCRIMINATION	AND CLAIMS			
	Baselines	Targets	Results to Date	
Staff Turnover Rates	8.52%	<10%		
# of unplanned absence days * # of potential days	No data available	TBD		
Lost work days Total work days				
L&I Experience rating	1.044	1.0	1.1114 in 2016	
Union Grievances	0 per year	0 per year	2 in 2015	
EEOC or Human Rights filed claims	1 per year	0 per year	1 in 2014	

*Unplanned absence tracking will begin in 2015. No way to track on ADP at this time.

7.3 AUDIT RESULTS

7.3.1

AUDIT SCORES BY OUTSIDE ENTITIES re THA PROPERTIES AND PROGRAMS

[As each audit, site visit, or other type of review varies greatly from funder to funder and year to year, THA staff developed a form to collect all data regarding the various audits that gives appropriate weights to each one and determines a score that can be compared from year to year, but is less useful standing on its own.]

AUDIT SCORES			
	Baselines	Targets	Results to Date
State of Washington Auditor Findings	0 (2013)	0	
THA Audit Compilation Score	70 (2013)	40	



TACOMA HOUSING AUTHORITY

TACOMA HOUSING AUTHORITY's EDUCATION PROJECT

(Last Revised January 23, 2019)

1. PURPOSE OF THA'S EDUCATION PROJECT AND PROPOSITIONS TO TEST

THA's Education Project seeks ways to spend a housing dollar not only to house needy households but also to serve two other purposes:

- help them and their children succeed in school;
- help Tacoma's public schools and colleges educate low-income students.

THA seeks to do this for three reasons. **First**, THA's mission is to help people succeed not just as tenants but also as "parents, students, wage earners and builders of assets who can live without assistance." THA wants its clients to prosper. In this way, it wants their time with THA to be transforming, and temporary. It wants this especially for children and young people. This success requires school success.



Second, THA wants its communities to succeed. It tries to help neighborhoods be "attractive places to live, work, attend school, shop and play" and to help its city be "safe, vibrant, prosperous, attractive and just." This requires successful schools and colleges.

Third, public schools and colleges face challenges that low-income students bring to the classroom. For example, it is hard to teach or learn when the student is homeless. Tacoma schools and colleges cannot meet these challenges without help. THA seeks to do its part.

When this works it is a very good use of a scarce THA housing dollar.

THA began this effort surmising it can influence school outcomes. This surmise arose from some facts that are true for most housing authorities and their communities. They are surely true in Tacoma:

- Except for the school district and the public assistance agency, THA serves more low-income children than any other organization in Tacoma. It houses about 1 of 7 Tacoma public school students and about 1 of 4.5 low-income students.
- In serving families, THA is deep into their lives, as landlord, provider of very valuable housing assistance, and provider of supportive services. This gives THA an influence over their behavior and choices.
- THA owns large communities that can be staging grounds for educational initiatives.
- THA resources can lever reforms and investments from school districts and others.

THA's Education Project is a full partnership with Tacoma Public Schools (TPS), Tacoma Community College, University of Washington Tacoma, other service providers, and funders. To learn more about THA's Education Project go to www.tacomahousing.org.

2. SOME ELEMENTS OF THA's EDUCATION PROJECT

THA's Education Project has about 12 initiatives in three categories: (i) *Early Childhood*; (ii) *P-12th grade*; (iii) *After high school*. Here is a short description of some of them:

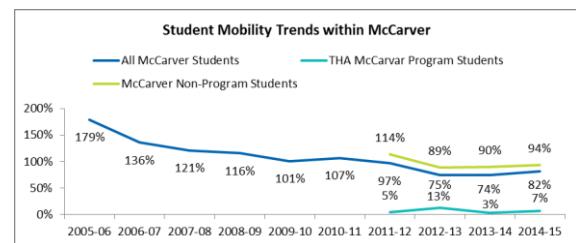
2.1 THA's Tacoma Public Schools Housing Assistance Program (*underway*)

THA pays to house homeless families with children enrolled in Tacoma Public Schools. This program began in 2011 at Tacoma's McCarver Elementary School. McCarver's had more homeless students than any other elementary school in the region, possibly the state. As a result, from 2005 and 2011, McCarver's students had a transient rate ranging each year between 101% and 179%.



The McCarver Housing Assistance Program has five parts. (1) *Housing*: To help stabilize the school, THA provides rental assistance to house 50 homeless McCarver families whose 85 children constitute about 20% of the school. (2) *Parental Commitments*: The Project initially asked participating parents to keep their children at McCarver. This request was reasonable at the time when the rental market allowed parents with THA's rental assistance to find housing close to the school. That is not true anymore. Tacoma's rental market is increasingly unaffordable. Beginning in 2017, the program allows parents to participate from their local school near where they find housing. The program still requires parents to participate actively in their children's schooling, and invest in their own education and employment prospects. (3) *Supportive Services*: THA and its partners provide services to help parents fulfill their commitments. (4) *TPS Investment*: TPS invested the considerable resources to bring the International Baccalaureate Primary Years Program to McCarver. (5) *Program Evaluation*: A third party evaluator tracks an array of program and participant outcomes.

The outcomes from the first five years of the project (2011-2016) were promising. The school's annual transient rate declined from 114% prior to THA's initiative down to 82% at the end of year 4. Reading scores for cohort children went up by 33 % in the first year, nearly three times faster than comparable cohorts. In the second and third year, the cohort children retained those gains, performing above all other children at the school. By the end of year 4 cohort students were performing at levels comparable to all students across the district. The average earned income of the cohort families doubled. (Although the median income did not change, reflecting challenges of disability, trauma and addiction facing about a third of the families.)



These encouraging results allowed THA and TPS and their partners to plan the expansion of the program to more homeless students in all Tacoma schools and all grades, beginning in September 2019.

2.2 THA's College Bound Scholarship Enrollment Project

Between 2008 and 2013, THA signed up nearly all of its 8th graders each year in Washington State's College Bound Scholarship Program (CBS). CBS is a promise the state has made to every low-income child in the state: if he or she graduates from high school, with at least a 2.0 G.P.A., stays out of serious trouble and enrolls in a qualified post-secondary program, the state will ensure grants to make tuition affordable. There is a catch. The student and his or her parent/guardian must sign up for the program by the end of 8th grade. When the program began, for lack of that signature, nearly half the state's eligible children missed this chance.

THA resolved to sign up all its 8th graders, every year. THA started by adding the CBS application to the forms families fill out yearly as participants in THA's housing programs. Within 3 years THA reached 100% sign up rate. At the same time, TPS led an aggressive district-wide enrolment effort focused on the middle schools. That district effort now enrolls virtually all Tacoma's eligible 8th graders yearly. This has allowed THA to subordinate its own efforts.

Students Enrolled in the Washington State College Bound Scholarship Program by the End of Eighth Grade*					
	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
THA	83%	91%	Approx. 100%	Approx. 100%	Approx. 100%
Tacoma Public Schools	77%	90%	Approx. 100%	Approx. 100%	Approx. 100%
Washington State	55%	68%	75%	77%	81%

This positive experience with its own enrollment efforts was an early success of THA's Education Project. It encouraged THA to think that indeed a housing organization like THA could influence educational outcomes.

2.3 THA's Children's Savings Account Program for Students of New Salishan

Children's Savings Accounts (CSAs) are asset-building accounts for education purposes school.

These accounts can start as early as birth.

Research concludes that low to moderate-income students with these accounts are three times more likely to enroll in college and four time more likely to graduate than their peers without such accounts. *See www.prosperitynow.org.*



In the fall of 2015 THA launched its CSA Program for all Salishan children who attend public school. Salishan is THA's largest community with about 850 renter households and 350 homeowners. It is an award winning master planned neighborhood. It has an elementary school, a middle school, a regional primary health clinic, and a regional recreation and community center all inside the community or next door.

THA CSA's program is designed to help Salishan students, and their families, aspire to college, prepare for it, pay for it and feel they belong when they go. It will get unbanked families banked. It will knit the region's most diverse neighborhood

together by eliciting and enlisting its shared hope and expectation that its children will go to college. THA's CSA Program has these parts:

Elementary School Stage: When a Salishan student enrolls in elementary school, THA offers a savings account in his or her name. THA is the account custodian. THA makes an initial \$50 deposit into the account. THA matches the family's deposit into the account up to \$400 per year. This match will continue through 5th grade. The match stops at the end of 5th grade.

Middle School through High School Stage: When students reach 6th grade they can earn more deposits by meeting milestones set for each grade. *E.g:* improved attendance; extracurricular activities, improved Grade Point Average; enrolling in the College Bound Scholarship Program; taking college preparatory courses; applying to college; getting into college; graduating from high school, and starting college. Upon the student reaching each milestone, THA will deposit more money into the account up to \$700 per year.

The program's contributions to those accounts will be available to the student only if and when he or she completes the journey and enrolls in a qualified education or training program after high school and then only for the costs of attendance. These costs include the non-tuition costs of attendance, particularly housing.

The program is tracking mid-term and long term metrics. The main one are: academic performance during participation, high school graduation rates, college enrollment rates, college graduation rates; getting unbanked families banked.

THA seeks a partner to expand this program to all Tacoma children.

2.4 THA's College Housing Assistance Program (CHAP)

THA pays to house 250 homeless or near homeless students enrolled at Tacoma Community College (TCC) and the University of Washington Tacoma. The Harvard Kennedy School Ash Center for Democratic Governance and Innovation named CHAP one of the "[Top 25 Innovations in American Government for 2018](#)." This program began as a pilot in 2014, housing 45 homeless TCC students. Two years of outcomes encouraged THA and TCC to expand it to its present scale.

	Homeless/Near Homeless TCC Students Receiving Housing Assistance (47)	Homeless/Near Homeless TCC Students Receiving No Housing Assistance (154)
Graduated or Remaining Enrolled	60%	16%
Grade Point Average	3.05	2.75

The expanded CHAP now houses students in three ways:

Rental Assistance

First, THA provides rental assistance to 150 homeless or near homeless students at TCC. About 70% of these students are parents. Students must make adequate academic progress toward a degree. The assistance lasts until graduation or 3 years.

The program includes 25 homeless TCC students who begin their studies while in prison. Most of them are mothers reuniting with children. Their housing problems are particularly challenging.

THA's Housing

Second, THA also rents its own housing to homeless or near homeless TCC students. As originally designed, the CHAP presumed that its rental assistance would allow students to rent housing on the rental market reasonably close to the TCC campus. That worked until 2017 or so when the rental market around the campus, even with rental assistance, became unaffordable. In response, THA purchased apartments within walking distance of the campus. It now owns 120 apartments. THA also purchased a 7 acre mall across the street from the campus. Within the next 5 years or so, on this mall, THA and its partners will develop 300 to 500 apartments, with commercial and community space. A portion of these apartments will be available to TCC students.

Contracts with Private Apartments

Third, THA has long term contracts with owners and developers of market rate apartments. These contracts set aside apartments for homeless or near homeless TCC or University of Washington Tacoma students. THA provides a subsidy to the owner to pay down the rents to levels affordable to those students. To date, THA has 114 apartments under such contracts within an easy walk of either the TCC campus or the campus of the University of Washington Tacoma. THA seeks to expand this to still other privately owned apartment complexes.

2.5 Educational Services in THA Communities

THA communities can be good staging grounds for educational services. This is an advantage for those educational services that are more effective when they are part of the visible, walking landscape. For example, THA's community of New Salishan has Lister, Roosevelt and Blix elementary schools and First Creek Middle School either within its borders, next door or just down the street. Other educational services at THA properties include:



- Head Start program at Bay Terrace property.
- THA's summer lunch and literacy program in three housing sites
- Computer labs at all family communities, with tutoring.
- Mentoring and tutoring programs provided by community partners.

2.6 THA's Distribution of Children's Books

THA distributes nearly 10,000 children's books every year. THA does this in several ways:

- All its properties and offices have bookcases filled with children's books. A sign encourages people to take books.

- THA staff encourage clients to take books, and offer a soft word about the value of reading for children.
- THA inspectors carry children's books with them. They offer the books when visiting an apartment. These offers can also "soften" an encounter that can otherwise be an anxious moment.

2.7 Campaign of Expectations

School success depends in part on what students feel people expect of them. A community can be a useful source of expectations. This is most likely in a discrete community of families that already identifies itself in positive ways. THA's housing communities provide that chance. For example, THA seeks to embed the expectation that its client children shall read on grade level and graduate from high school. This campaign of expectations will include the following efforts:

- College Bound Scholarship Enrollment Project
- educational expectations imbedded into individual case management plans
- free books program at all THA properties and offices
- celebrate graduations from elementary school, middle school and high school, and college send-offs.

2.8 Data Collection and Performance Measures

THA has an agreement with Tacoma Public Schools to share data. This allows THA and TPS to track performance measures to assess the effect of its Education Project.

For more information contact:

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TACOMA HOUSING AUTHORITY

THA's EDUCATION PROJECT: ELEMENTS

Last revised January 23, 2019

PURPOSE OF THA's EDUCATION PROJECT

THA's Education Project seeks ways to spend a housing dollar, not only to house people, but also to promote two other outcomes:

- help the children and grown-ups it houses succeed in school;
- help Tacoma and Pierce County public schools and colleges educate low-income students.

When it works, it is a very good use of a housing dollar. To learn more about THA and its Education Project go to www.tacomahousing.org

ELEMENTS OF THA's EDUCATION PROJECT

1. Early Childhood
2. P – 12th Grade
3. After High School Education and Training

1. EARLY CHILDHOOD		
1.1	Head Start/ ECEAP Classrooms at THA properties	THA hosts a Head Start classroom of the Tacoma Public Schools (TPS) at its Bay Terrace community building. It is in a classroom THA built for the purpose. It is the only TPS Head Start classroom outside a school building.
1.2	Children's Book Distribution Program	THA distributes about 10,000 children's book a year. It has bookcases at all of its properties and offices. THA stocks them with children's books. A sign encourages people to take and keep the books. THA staff encourage children and parents to take and keep books. Staff also offer them a soft word about the importance of reading. THA housing inspectors carry books with them to leave with families during inspection visits. Doing this also "softens" the effect of an inspection.

1. EARLY CHILDHOOD ELEMENTS [continued]		
1.3	Early Child Development Center and Child Care Providers at Salishan <i>(planned)</i>	New Salishan is THA's largest community. It is a 200 acre HOPE VI redevelopment of rental housing and home ownership. THA plans to turn its present community building into the region's largest early childhood development center and child care provider.
1.4	Hillsdale Heights Intergeneration Campus <i>(planned)</i>	<p>THA owns 7 acres in Tacoma's Eastside called Hillsdale Heights. THA and its partners will develop the following:</p> <ul style="list-style-type: none"> ● single family homes or townhomes to rent to low-income families fostering or adopting high needs children; ● apartments for low-income seniors who by living there agree to be respite caregivers, honorary grandparents and support to those children and families; ● facilities for the child welfare organizations that will manage the services for the campus.

2. P– 12th Grade

2.1	Tacoma Public School Housing Assistance Program	<p>THA houses or pays to house homeless families with children enrolled in Tacoma Public Schools.</p> <p>This program began in 2011 at McCarver Elementary School. McCarver Elementary School had yearly transient rates that ranged up to 179%, primarily because of family homelessness. On the strength of the third-party evaluation of outcomes since then, THA and TPS plan the program's expansion to house more homeless TPS families in all schools and all grades. The expansion will begin September 2019. They are also redesigning the program to account for what they learned from the McCarver experience about what worked and what did not work.</p>
2.2	Children's College Savings Account Program (CSA)	<p>Tuition is not the only barrier that keeps low-income students out of college. In addition, their parents make the misjudgment early on that college is not affordable or otherwise not for their children. As a result, their children make the same misjudgment. Even if tuition is covered by the College Bound Scholarship program (<i>see section 2.5</i>) families and students struggle with the non-tuition costs of attendance. The cost of housing is the primary challenge. For these reasons, these students do not expect to go. They do not prepare to go. If they seek to go, they do not have enough support to tell them how to go or how to pay for it. And if they go, they are not ready or do not feel like they belong. This can be especially true if they are low-income, students of color or the first in their family ever to go to college. Yet research reports that such low-income children with college savings accounts starting young, in comparison with low-income children without accounts, are much more likely to enroll in college, and to graduate. <i>See www.prosperitynow.org</i></p> <p>THA's College Savings Account Program offers accounts to all children at THA's community of New Salishan. It has 2 main parts:</p> <ul style="list-style-type: none"> ● the Match: starting in kindergarten through 5th grade the program will match a family's deposits into the accounts up to \$400 per year; ● the Incentive: from 6th through 12th grade, the program will make further deposits into the accounts up to \$700 per year as the student meets designated milestones, largely of an academic nature <p>Students who participate fully from kindergarten will graduate from high school with at least \$9,700. These account balances become available to the student only for the cost of attendance at a qualified post-high school education or training program;</p>

2. P – 12th Grade [continued]

2.3	Arlington Drive Campus for Homeless Youth and Young Adults	<p>A significant number of youth and young adults are homeless in Pierce County. These young people face much higher risks of drug abuse, sex trafficking, violence, and greatly diminished prospects for a reasonable adolescence, an education, an occupation and a successful adulthood.</p> <p>THA owns 3.5 acres near its community of New Salishan. THA calls it Arlington Drive. With partners, THA will develop a campus on that property with the following features:</p> <ul style="list-style-type: none"> ● 12 bed Crisis Residential Center/HOPE Facility (CRC) for homeless youth, ages 12 to 17 years. Community Youth Services (CYS) will manage the CRC. CYC has been doing this work for 45 years in Thurston County. It is a national leader in its successful, evidenced-based practices. That service model has a 91% rate of successful discharge of these youth to a safe and stable housing after an average 12 day stay. At that rate, the Arlington CRC will serve and save nearly 400 youth a year; ● 58 rental apartments for homeless young adults, age 18 to 24 years (30% will be parents); The YMCA of Greater Seattle will provide supportive services to these young adults. The Y is also a national leader in this work, with an evidence based service model. <p>This campus will be in walking distance of the following complementary facilities:</p> <ul style="list-style-type: none"> ● First Creek Middle School; ● Tanbara Regional Primary Health Care Clinic; ● East Side Community Center ● Salishan <p>This campus will give these youth and young adults a second chance at a reasonable adolescence, an education, a livelihood and a second chance at a life without exploitation, abuse, impoverishment and fear.</p>
2.4	Attendance Early Warning Program <i>(planned)</i>	Chronic absenteeism is an important predictor of a student's school failure. PS and THA will devise a data exchange that will alert THA of any child in its housing programs missing too much school. THA caseworkers will then inquire and help redirect the student back to school.

2.5	<p>College Bound Scholarship Enrollment Project</p>	<p>A post-high school certificate or degree is an important determinate of adult prosperity. Yet most low-income students, even if they graduate from high school, do not enroll in such programs after high school; even fewer graduate from them. The prohibitive cost of tuition is one reason. Yet that should not be a barrier in Washington State because of its College Bound Scholarship (CBS) program.</p> <p>The CBS is a promise that the state makes to every low-income student: if you graduate from high school, end with at least a 2.0 Grade Point Average, stay out of serious trouble and enroll in a qualified post-high school degree or certificate program, the state will pay for tuition up to the average cost of a state four year college. This is a life-transforming promise. However, there is a catch. The student and his or her parents must sign up for the program by the end of the student's 8th grade. When THA began this enrollment initiative, over half of Tacoma's students and THA's students were missing out on this promise.</p> <p>THA began a very aggressive effort to enroll its 8th graders every year. It succeeded four years in a row to enroll nearly all of them. It did this by adding the CBS enrollment form to the normal paperwork that THA does with its families every year. This took advantage of a fact of nature: that someone who has just signed four pieces of paper is probably willing to sign a fifth. THA also participated in an aggressive citywide enrollment effort that takes place in the middle schools. That city-wide effort has been successful enough to allow THA to subordinate its own efforts. This project will now monitor that citywide enrollment to determine if THA ever needs to resume its own efforts.</p>
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3. AFTER HIGH SCHOOL EDUCATION OR TRAINING

3.1 College Housing Assistance Program (CHAP) THA houses or pays to house 250 homeless students enrolled at Tacoma Community College (TCC) and the University of Washington Tacoma. The Harvard Kennedy School Ash Center for Democratic Governance and Innovation named this program as one of the “[Top 25 Innovations in American Government for 2018](#).” This effort addresses the growing homelessness among Tacoma’s college population. A 2016 survey of TCC students reported that 69% experienced housing instability and 27% experienced homelessness. Housing makes a big difference in their outcomes. THA and TCC’s data from a pilot study show that after two years only 16% of homeless students remained enrolled; yet, 60% of the housed students graduated or remained enrolled.

	Homeless/Near Homeless TCC Students Receiving Housing Assistance (47)	Homeless/Near Homeless TCC Students Receiving No Housing Assistance (154)
Graduated or Remaining Enrolled	60%	16%
Grade Point Average	3.05	2.75

These positive outcomes allowed THA to expand the program to serve 20 students. It does this in three ways:

Rental Assistance

First, THA provides rental assistance to 150 homeless or near homeless TCC students. About 70% are parents. Students must make adequate academic progress toward a degree. The assistance lasts until graduation or 3 years. The program includes 25 homeless TCC students who begin their studies while in prison; (Most are mothers reuniting with children; because of their criminal record, their housing problems are particularly challenging.)

THA's Housing

Second, THA also rents its own housing to homeless or near homeless TCC students. As originally designed, the CHAP presumed that its rental assistance would allow students to find housing on the rental market reasonably close to the TCC campus. That worked until 2017 or so when the rental market around the campus, even with rental assistance, became unaffordable. In response, THA purchased apartments within walking distance of the campus. It now owns 120 apartments. THA also purchased a 7 acre mall across the street from the campus. Within the next 5 years or so, on this mall, THA and its partners will develop 300 to 500 apartments, with commercial and community space. A portion of these apartments will house TCC students.

Contracts with Private Apartments

Third, THA has long term contracts with owners and developers of market rate apartments. These contracts reserve apartments for homeless or near homeless TCC or University of Washington Tacoma students. THA pays a subsidy to the owner to buy down the rents to levels affordable to those students. To date, THA has 114 apartments under such contracts within an easy walk of either the TCC campus or the University of Washington Tacoma campus. THA seeks to expand this to still other privately owned apartment complexes.

3. AFTER HIGH SCHOOL EDUCATION OR TRAINING [continued]		
3.2	Rapid Rehousing Investment for Homeless Young Adults	THA invests \$1.288 million yearly into Pierce County's rapid rehousing system for rental assistance for homeless families with children and homeless young adults (aged 18-24)(\$288,000 is for the young adults). Using these funds, Pierce County contracts with local housing providers to assist homeless young adults find housing. The providers help young adults to find educational and employment resources. The goals of the program are to stabilize the young adults so they do not return to homelessness and get another chance at a successful adulthood.
3.3	Rental Assistance for Youth Aging Out of Foster Care	THA has a HUD program (Family Unification Program) and its own local program to provide rental assistance to youth aging out of foster care. It is important that these vulnerable young adults have adequate housing as they begin their adult life. This program provides up to three years of rental assistance and, in partnership with a local non-profit, provides case management to help participants get education and job training and a job.

The initiatives showing in this chart supplement THA's mainline housing programs that provide affordable housing to thousands of very low-income households with children. Those programs house or pay to house 1 of every 7 Tacoma public school student and 1 of every 4.5 low-income Tacoma public school student. That assistance by itself increases the educational prospects of these children and their parents.



TACOMA HOUSING AUTHORITY

THA REAL ESTATE DEVELOPMENT SINCE 2002*

[since the beginning of the development of New Salishan]

As of April 21, 2021

Unit Count		Unit/Years Count		
Existing Units as of 2002		Unit-Years as of 2002		
Old Salishan	855	0 years/unit	0	0
Senior Units	353		1,765	1,765
Hillside 1500 Block	16		80	80
Hillside 1800 Block	23		115	115
Hillside 2300 Block	46		230	230
Hillside 2700 Block	81		405	405
Bergerson Terrace	72		360	360
Dixon Village	31		155	155
Single Family Homes	93		465	465
Stewart Court	58		290	290
Total Units	1,628	Total Unit-Years		3,865
Units Sold/Demolished Since 2002		Units Fixed Up Since 2002 and their Unit/Years as of 2021		
Old Salishan (demolished)	-855	Bergerson Terrace	72	23 years/unit
Hillside 1800 Block (demolished)	-23	Dixon Village	31	23 years/unit
Hillside 2500 Block (demolished)	-81	Hillside Terrace	62	8 years/unit
Stewart Court (sold)	-58	7 Buildings for Seniors/Disabled Persons (2017)	353	23 years/unit
Single Family Homes (sold)	-93	Subtotal Units	518	Subtotal Unit-Years
Subtotal Units	-1,110	Subtotal Units	518	Subtotal Unit-Years
Units Built Since 2002 and their Unit-Year Count as of 2021				
New Salishan (2004 – 2010) <i>(counting 110 senior units & 379 home developed by THA partners)</i>	1,119	14 years/unit (average)	15,666	15,666
Bay Terrace	144	23 years/unit	3,312	3,312
Prairie Oaks Apartments (2015)	15	21 years/unit	315	315
The Rise on 19 th	64	25 years/unit	1,600	1,600
Arlington Drive Campus for Homeless Young People	70	25 years/unit	1,750	1,750
Subtotal	1,412	Subtotal	22,643	22,643
Units Purchased Since 2002 and their Unit-Year Count as of 2021				
Alberta Canada Apartments 2018)	48	23 years/unit	1,104	1,104
Outrigger Apartments (2015)	49	13 years/unit	637	637
Highland Crest (2017)	73	13 years/unit	949	949
Subtotal	170	Subtotal	2,690	2,690
TOTALS				
UNITS/UNIT YEARS as of 2021 and NET CHANGES SINCE 2002				
Unit Count	2,100	Unit/Year Count	36,317	
[net change since 2002 +472]		[net change since 2002 +32,452]		
(29% increase)		(840% increase)		

PLANNED UNITS AS OF 2021 ON VACANT LAND THAT THA OWNS	
Salishan Remaining Lots	18
Hillside 1800 Block	70
Vacant Land Purchased Since 2002	
James Center North	300-500
Hillsdale Heights	100-150
Hilltop Parcels	254-293
TOTAL	742-1,031

UNITS IN OTHER PORTFOLIOS THAT THA FINANCED	
THA finances the development of units owned and managed by non-profit partners or others. Sometimes THA is the lender. Sometimes it issues bonds. Sometimes it is the developer. Sometimes it provides the land or sells the housing. Most of the time it project-bases housing vouchers into the development under long-term contracts to finance construction debt, operations, and affordability.	
TOTAL	1,026

* These data do not include about 3,500 low-income households that receive tenant-based rental assistance under various THA programs that pay rent to landlords on the private rental market.



Tacoma Housing Authority

Project Database

OPEN/FUTURE PROJECTS FOR ALL DEPARTMENTS

June 10, 2021

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
1. 1500 Hillside Terrace Development	RD-2019-007	Real Estate Development	Open December 31, 2021	2	Vickie Stark Vickie Stark
Project Summary: Redevelopment of 1500 Hillside Terrace					
2. 1800 Hillside Terrace Development	RD-2017-019	Real Estate Development	Open December 31, 2021	1	Steve Clair Steve Clair
Project Summary: Redevelop with up to 70 affordable housing units					
3. 2020 MTW Report	PI-2021-001	Administration	Open March 31, 2021	1	Ava Pittman Ava Pittman
Project Summary: This project outlines the requirements of THA's annual MTW Report.					
4. 311 Mobilization and Outreach	RD-2016-008	Advocacy and Public Education	Open January 01, 2021	2	Kathy McCormick Chris Govella
Project Summary: Community engagement activities that highlight the availability and access to community resources, including the 311 program, to Hilltop community residents.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
5. 6th Ave Shop Rehab	PM-2020-004	Property Management	Open April 20, 2020	1	Ronald Greeney David Dailey
		Project Summary:	Rehab 6th ave Garage/Shop		
6. 902 TI	RD-2019-006	Real Estate Development	Open December 31, 2021	2	Vickie Stark Vickie Stark
		Project Summary:	Space Study and Tenant Improvement of the THA 902 Office Building.		
7. AD - THA Policy Committee	AD-2021-006	Administration	Future June 30, 2021	1	Jennifer Rickey Jennifer Rickey
		Project Summary:	This is a short term project created to help the new committee gain traction.		
8. Admin - Document Management System Design and Creation	AD-2006-002	Administration	Open December 31, 2021	1	Sandy Burgess Jennifer Rickey
		Project Summary:	THA needs a system to efficiently account for its business relationships and transaction histories and to provide for the safe and easy storage and retrieval of documents, in both paper and electronic form. This project must decide how to store and organize THA's documents and other important information. It relates to several other important projects, including THA's Share and Shadow drives, ISYS, SharePoint, and the THA Library.		
9. Administrative Plan-Rewrite 2020	PI-2020-003	Administration	Open April 30, 2021	1	Ava Pittman Ava Pittman
		Project Summary:	This project will undertake recreating THA's current Administrative Plan which governs all of THA's Housing Choice Voucher programs.		

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
10. Administrative Services Department Reorganization	AD-2021-001	Administration	Open June 30, 2021	1	Sandy Burgess Sandy Burgess
Project Summary:	Reorganization of Administrative Services to provide leadership to diverse areas. This is necessary with the increased technology needs as well as additions to the department such as Procurement, BPI, document management, etc.				
11. Advisory Board for THA: Consideration and Planning	EX-2015-007	Advocacy and Public Education	Future	2	Michael Mirra Michael Mirra
Project Summary:	This project will consider creating a THA advisory board. Such a board would serve four purposes: (1) advise on policy choices; (2) embed THA's work more firmly in the community; (3) raise community support and funds; (4) nurture future THA commissioners. If THA decides to create one, this project will create it.				
12. Agency Wide Calendar	EX-2006-010	Administration	Future	2	Michael Mirra Michael Mirra
Project Summary:	This project will create a shared electronic calendar to depict the many mandatory deadlines governing THA's activities, both regular and irregular. This will help us track these deadlines. It will also help the entire agency understand what deadlines face the different departments.				
13. Alberta Canada Renovation	RD-2016-002	Real Estate Development	Open February 28, 2019 September 08, 2017	1	Kathy McCormick Steve Clair
Project Summary:	THA acquired the membership interest in New Look in October, 2015. It plans to renovate New Look to extend the remaining useful life of the property and to upgrade the exterior to be more beautiful and set the tone for future development and redevelopment in the Hilltop.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
14. AM - Property Contractual Obligations, Rights and Deadline Tracking	AD-2011-014	Administration	Open	1	Sandy Burgess Rebecca Spencer
Project Summary:	THA has tax credit properties. As part of the deal with the investors, THA has a right to purchase the properties from the investors at the end of the 15 year compliance period. THA has a similar purchase right for properties it financed as a conduit issuer of bonds. This project will calculate the purchase price for each property.				
15. AM - Scattered Site Single Family Home Disposition	AD-2014-021	Administration	Future December 31, 2021	1	Sandy Burgess Rebecca Spencer
Project Summary:	The HUD Section 32 program allows public housing authorities to dispose of rental public housing units for the purpose of providing these units for sale to low income (< 80% AMI) PHA residents and the general public. If the Board approves, THA will submit a Section 32 application for the 34 scattered sites disposition				
16. Appliance asset disbursement	PM-2016-004	Property Management	Future	3	Pat Patterson Frankie Johnson
Project Summary:	Determine methodology for giving appliances to residents				
17. Appliance Asset Distribution - Salishan	PM-2020-007	Property Management	Open April 01, 2021	2	Marquis Jenkins Marquis Jenkins
Project Summary:	Salishan is the only THA property where Washer and Dryer units are provided. Maintenance staff spend an enormous amount of time servicing these machines, as well as money replacing them. This project is designed to stop supplying machines to new households, transfer existing machines to tenant ownership, or remove machines that are unwanted.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
18. Arlington Apartments Grand Opening	EX-2020-008	Administration	Open October 01, 2021	2	Nick Tolley Zanaasha Johnson
Project Summary: The Tacoma Housing Authority will promote the grand opening of the Arlington Apartments at the Arlington Drive Youth Campus in November. Due to the Coronavirus Pandemic we will use digital means to host the event.					
19. Arlington Campus Art Selection	RD-2019-012	Administration	Open March 01, 2021	1	Joshua Jorgensen Joshua Jorgensen
Project Summary: This project will outline the selection of art for the Arlington Youth Campus Apartments.					
20. Arlington Drive Construction: Hiring Section 3 and Young People	CS-2019-003	Administration	Open December 31, 2020	2	Cacey Hanauer Cacey Hanauer
Project Summary: Plan for THA and Korsmo construction to hire young adults and folks who qualify as section 3 into construction roles.					
21. Arlington Drive Youth Campus - Crisis Residential Center	RD-2017-006	Housing and Supportive Services	Open June 30, 2020	1	Kathy McCormick Kathy McCormick
Project Summary: THA will build and own a 12 bed residential building for homeless youths 12-17.					
22. Arlington Drive Youth Campus - Rental Housing	RD-2017-007	Real Estate Development	Open December 31, 2021	1	Kathy McCormick Kathy McCormick
Project Summary: See Description of Arlington Drive Youth Campus					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
23. Asset Management Plan	AD-2021-009	Administration	Open December 31, 2022	1	Rebecca Spencer Rebecca Spencer
Project Summary:	Develop AM and Compliance Team Develop and Hiring Plan				
24. Attendance Guidelines Pilot	HR-2015-006	Administration	Future January 31, 2020	1	Amanda Parent Amanda Parent
Project Summary:	Design and pilot a THA Attendance Guidelines project so that Managers will have a consistent method to hold employees accountable to attendance expectations.				
25. Bad Debts: Review of How THA Manages Bad Debts that Clients Owe	FD-2019-002	Administration	Future December 31, 2019	2	Michael Mirra Michael Mirra
Project Summary:	Sometimes clients or former owe THA money. Usually they were tenants leaving owing money for unpaid rent or damages. THA presently refers some of these to collection agencies and reports them to credit bureaus. This project will review whether THA should instead forego those steps to avoid making a hard life harder.				
26. Bay Terrace Phase I Lobby Remodel	PM-2017-010	Property Management	Future January 15, 2018	1	Gretchen Sinkula Gretchen Sinkula
Project Summary:	Property Management is updating the lobby in the mid-rise at Bay Terrace Phase I with new furniture and benches and to improve the acoustics in the main lobby.				
27. BehindMLK	CS-2017-010		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
28. Bergerson Maintenance Shop Reorganization	PM-2019-003	Property Management	Open June 03, 2019	3	Ronald Greeney David Dailey
		Project Summary:	Reorganize Bergerson Shop for maximum efficiency.		
29. Bergerson Shop Rehab	PM-2020-003	Property Management	Open April 20, 2020	1	Brian McFadden David Dailey
		Project Summary:	Rehab Bergerson Shop, Storage, and Lot		
30. Bismark CRC	RD-2018-002	Real Estate Development	Open December 31, 2019	1	Joshua Jorgensen Joshua Jorgensen
		Project Summary:	Arranging the use of THA's public Housing Scattered site located at 120 E. Bismark, for the use as a 6 bed Crisis Residential Center. This project is related to the closed project PI-2016-005		
31. Board Commissioner Recruitment	EX-2015-005	Administration	Open	1	April Black April Black
		Project Summary:	The Commissioners on THA's board provide essential leadership, strategic direction and support to THA and staff. By law, Tacoma's Mayor appoints them. The Mayor typically asks the executive director to suggest several people he or she might consider. This project pertains to the effort to find good candidates to suggest to the Mayor.		
32. Bond Financing Instruction	FD-2013-003	Real Estate Development	Open July 06, 2018	2	April Black Ken Shalik
		Project Summary:	THA has the capacity to issue bonds. It can also be a conduit for bond financing of other people's projects. This project will improve THA's understanding of this capacity, of its uses and risks. This project will review the bond deals THA presently has underway or consummated. It will also devise any necessary policies and procedures to govern THA's use of its bonding authority.		

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
33. Book Distribution Program	CS-2016-002	Housing and Supportive Services	Open December 29, 2017	1	Cacey Hanauer Martin Higgins
Project Summary:	The purpose of this project is to enhance THA's Free Book Program by formalizing the process for obtaining, distributing, and tracking the usage of free books at THA properties for children and adults.				
34. BPI - Business Process Inventory - Current State Documentation	AD-2018-004	Administration	Open	1	Sandy Burgess Sandy Burgess
Project Summary:	This project represents an inventory of business processes organized by department. Each objective represents the status of process documentation for the CURRENT STATE. Closed objectives indicate that current state documentation has been created by BPI and available on the Share Drive (T:) 9. Business Process Improvement.				
35. Bridges			Open		
Project Summary:					
36. Business Activities-Administrative Support			Open		
Project Summary:					
37. Business Process: Combine BOC Processes Into One Project	EX-2018-001	Administration	Future June 29, 2018	2	Sha Peterson Sha Peterson
Project Summary:	There are a few Board of Commissioner (BOC)-related process that should be combined into one process under Executive.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
38. Business Process: Executive Administrator General Administration	EX-2016-012	Housing and Supportive Services	Future March 31, 2017	1	Sha Peterson Sha Peterson
		Project Summary:	Update the business process for EA General Administration.		
39. Cabinet Calendar - Unavoidables	AD-2021-007	Administration	Open	1	Sandy Burgess Sandy Burgess
		Project Summary:	Unavoidable Tasks for 2021-2022		
40. Cabinet Team Building and Succession Planning	EX-2019-007	Administration	Open December 31, 2021	1	April Black April Black
		Project Summary:	This project will include work to improve Cabinet dynamics within a Cabinet that has had a significant change in membership over the past two years. It will also plan and prepare for further staff transitions.		
41. Career Development Committee	HR-2014-005	Administration	Future December 31, 2015	2	Barbara Tanbara Barbara Tanbara
		Project Summary:	Work with this Committee to respond to the 2013 Employee Opinion Survey requests for development and training opportunities		
42. Census 2020 Initiative	RD-2019-015	Advocacy and Public Education	Open June 30, 2020	3	Roberta Schur Micah Tucker
		Project Summary:	The Census 2020 Initiative aims to mobilize a community led effort that will maximize participation in the 2020 Census Among THA clients.		

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
43. Centers for Strong Families	CS-2016-003	Housing and Supportive Services	Open	1	Cacey Hanauer Caroline Cabellon
Project Summary:	THA will participate in the formation of an Integrated Services Center. This is a United Way Initiative that is bringing multiple organizations together for collective impact. Helping families to create a more prosperous future by focusing on workforce development, financial stability, basic needs support and other family services.				
44. CHAP Security Deposit Assistance Program	CS-2018-008		Open		
Project Summary:					
45. Chelsea Move	EX-2020-002	Property Management	Future June 30, 2020	3	Sha Peterson Sha Peterson
Project Summary:	This project will show the necessary steps to take to secure a lease agreement and move staff to the Chelsea.				
46. Child Care, ECAP and HeadStart for THA Family Properties	CS-2017-021	Housing and Supportive Services	Open July 01, 2022	2	April Black Cacey Hanauer
Project Summary:	THA seeks to put ECAP or HeadStart programs and high quality and affordable child care providers in or near all its family properties. These will promote school outcomes among THA children and will help THA workable tenants find and keep work.				
47. Children's Savings Account Program - Redesign	CS-2017-035	Housing and Supportive Services	Open December 31, 2021	1	Amy Van Amy Van
Project Summary:	The redesign of the CSA program.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
48. City of Tacoma Housing Policy	EX-2010-001	Advocacy and Public Education	Open	2	April Black April Black
Project Summary: THA seeks to provide the City of Tacoma with useful data and advice on policies for the effective preservation and development of affordable housing for lower income city residents. This project pertains to that effort.					
49. Client Support and Empowerment Strategy	CS-2006-002	Housing and Supportive Services	Open December 31, 2019	1	April Black Amy Van
Project Summary: Client Support and Empowerment is an important part of THA's programs. Services make THA's housing assistance more effective. Services help THA-assisted families prosper. This project will devise THA's service strategy. It will identify who THA will serve, what services it will provide to them, how it will provide the services and how it will pay for them.					
50. College Housing Assistance Program	PI-2013-003	Housing and Supportive Services	Open December 31, 2021	1	April Black Jessica Thompson
Project Summary: THA provides or finances housing in three ways for homeless or near homeless TCC or UWT students: <ul style="list-style-type: none"> • THA provides rental assistance to help pay rent on the private rental market; • THA provides apartments it purchased near campus. • THA signs long term contracts with private developments near the campuses to reserve their apartments for homeless or near homeless college students. THA pays down the rents to levels affordable to the students. 					
51. College Housing Assistance Program - DOC-CHAP	PI-2019-013	Housing and Supportive Services	Open September 30, 2021	1	Jessica Thompson Jessica Thompson
Project Summary: THA, TCC, and DOC are working in partnership to expand the College Housing Assistance Program to students who begin their college studies while in prison.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
52. Community Health Advocacy	CS-2014-003	Housing and Supportive Services	Future December 29, 2017	2	Cacey Hanauer Cacey Hanauer
Project Summary:	This project will determine the viability of developing community health advocate positions at THA. Specifically we will determine need, metrics for evaluation and sustainability for funding for CHAs at our senior and disabled properties, new Salishan and the Hilltop community.				
53. Community Wellness Program			Open		
Project Summary:					
54. COO Recruitment	HR-2015-001	Administration	Future December 31, 2015	1	Amanda Parent Amanda Parent
Project Summary:	THA will procure and work with an executive search firm to conduct a nationwide search to recruit and hire a top notch professional Chief Operating Officer.				
55. Corrections Housing--Opening Doors to Opportunity	PI-2017-015	Housing and Supportive Services	Open December 31, 2019	2	April Black Ava Pittman
Project Summary:	THA was awarded technical assistance from Vera Institute through the HUD Opening Doors to Opportunities grant.				
56. COT Project Management	RD-2016-012	Real Estate Development	Open	2	Kathy McCormick Karen Peterson
Project Summary:	This project is used to track the work done for the City of Tacoma.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
57. COVID 19: Face Masks Distribution to THA Clients	EX-2020-006	Housing and Supportive Services	Open August 07, 2020	1	April Black April Black
Project Summary:	The Washington State Governor, effective July 6th, has ordered, with limited exceptions, that all persons wear face coverings when in public and that all businesses required visitors to wear face coverings. This project will distribute face masks to every person in a THA client household.				
58. Covid Late Rent Help Program (Pierce County Funding)	RA-2020-004	Housing and Supportive Services	Open December 30, 2021	1	Aley Thompson Aley Thompson
Project Summary:	Pierce County will provide THA funds to pay up to 3 months of late rent for voucher holders and residents in late 2020. Additional funding may be provided in 2021				
59. Covid-19 Response	AD-2020-002	Administration	Open December 31, 2021	1	Jennifer Rickey Ginger Peck
Project Summary:	Covid-19 Response and Planning				
60. Covid-19 Tenant Resource Plan	CS-2020-003	Housing and Supportive Services	Open	1	Sandy Burgess Caroline Cabellon
Project Summary:	This project was created to track plans and partnerships for Tenant Resources during Covid-19 Stay Home Ordinance				
61. COVID19			Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
62. Credit Reporting for Good Rent Paying Tenants	PI-2015-007	Housing and Supportive Services	Future July 06, 2020	2	April Black April Black
Project Summary:	Good credit scores can help families prosper. Many low-income families, including THA tenants, have poor credit. Yet, most of them pay rent on time. This project will devise a way for THA to track those positive rental payment histories and report them to credit agencies. This will (1) boost credit scores and (2) encourage timely rent payments.				
63. Customer Survey	PM-2019-002	Property Management	Open July 01, 2019	2	David Dailey David Dailey
Project Summary:	Create a survey for customers to provide feedback on maintenance.				
64. Department of Commerce OHY Grant 2019-20	CS-2020-004	Housing and Supportive Services	Open June 30, 2020	1	Cacey Hanauer Caroline Cabellon
Project Summary:	FY 20-21 Office of Homeless Youth Proviso, granting \$91,346 to THA to operate the following OHY Core Programs: 1) HOPE/Crisis Residential Center, and 2) Young Adult Housing Program				
65. Develop Training Database	PM-2017-015	Property Management	Open July 31, 2018	2	Frankie Johnson Yvonne Ginoulis
Project Summary:	Develop training database to keep track of property management's past, present and future training.				
66. Director of Client Services Recruitment	HR-2018-001	Administration	Open May 31, 2018	1	Sharrall Madden Laura Miles
Project Summary:	THA will recruit and hire a Director of Administrative Services				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
67. Director of Finance Recruitment	HR-2021-001	Financially Sustainable Operations	Open July 19, 2021	1	April Black Amanda Parent
Project Summary:	THA will procure and work with an executive search firm to conduct a nationwide search to recruit and hire a top-notch professional director for Finance				
68. Disaster Voucher Program	RA-2017-005		Open		
Project Summary:					
69. Disposal of vehicles	PM-2017-017	Property Management	Open September 30, 2018	3	Justin Gonzales Justin Gonzales
Project Summary:	We have 5 vehicles that need to be disposed of. We also have a genie lift trailer and 2 lawnmowers at Salishan that need disposed of.				
70. DNU - Family Unification Program (FUP) Case Mgt	CS-2017-011		Open		
Project Summary:					
71. DSHS Data Sharing Project	PI-2014-002	Housing and Supportive Services	Future December 29, 2017	2	April Black April Black
Project Summary:	THA, the Seattle Housing Authority and the King County Housing Authority have signed a data sharing agreement with DSHS. This will allow DSHS to aggregate our data with data DSHS collects from state programs and school districts. This should allow PHAs to better understand and serve its populations. This project will manage the contract and make it as useful as possible to THA and the other PHAs.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
72. Education Project	PI-2006-004	Housing and Supportive Services	Open	1	Katie Escudero Katie Escudero
Project Summary:	THA seeks to promote the educational and career outcomes of the children and families who participate in its housing and service programs as part of an innovative two generation approach to transforming lives during a temporary time with THA. This project will devise, implement and evaluate large and small programs designed to make that happen.				
73. Education Project Data Evaluation	PI-2020-005	Advocacy and Public Education	Open December 31, 2021	3	Katie Escudero Katie Escudero
Project Summary:	THA seeks to contract FFTS to be our evaluation partner for the Education Project. At the same time, FFTS is undertaking a 2030 refresh of their community-level indicators. Both partners will be updating data sharing agreements with Tacoma Public Schools in the near-term and TPS is working on a new community partner portal. This is a natural point in time to inform and align conversations about housing and education indicators.				
THA and FFTS will use BERK Consulting to facilitate key workshops that will help inform us of the direction of the evaluation and the scope of work for the project.					
74. Elderly / Disabled Case Management Services	CS-2018-009		Open		
Project Summary:					
75. Elderly and Disabled Services Planning and Redesign	CS-2017-034	Housing and Supportive Services	Future December 30, 2016	2	Cacey Hanauer Cacey Hanauer
Project Summary:	THA will devise a plan for improved services for the elderly and disabled residents of its seven apartment buildings. The plan will include changes and additional services that will be implemented by late summer 2013. The plan will also include an assessment of longer term needs of Tacoma's aging populations and how THA can best serve them.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
76. Electronic Signatures on THA Documents	AD-2020-009	Administration	Open February 28, 2021	2	Karen Bunce Karen Bunce
		Project Summary:	Move to electronic signatures as allowed on all THA documents		
77. Elevator Portfolio Repair	AD-2020-005	Administration	Open December 31, 2030	2	Sandy Burgess Rebecca Spencer
		Project Summary:	The purpose of this project is to schedule repairs to our portfolio elevators.		
78. Emergency Housing Vouchers (EHV)			Open		
		Project Summary:			
79. Emergency Security Upgrade	PM-2017-011	Property Management	Open March 31, 2018	1	Yvonne Ginoulis Yvonne Ginoulis
		Project Summary:	Upgrade all sites with a duress system for emergencies		
80. Employee Recognition Plan	HR-2006-012	Administration	Future	2	Amanda Parent Amanda Parent
		Project Summary:	THA will devise a plan for regular and effective ways to publicly recognize (i) individual staff persons who do good work and (ii) the staff collectively.		

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
81. Equity, Diversity, and Inclusion: Making THA More Effective, and Just	EX-2018-012	Administration	Open	1	Cacey Hanauer Frankie Johnson
Project Summary:	This project will review and adjust ways THA can be effectively diverse, inclusive and equitable in three areas: as a workplace for staff, its programs to clients, and its role in the civic discussion of the city, state, and nation. In these ways, this project seeks to make THA more effective in its work, and more just.				
82. Eviction/Termination Notice & Grievance Hearing Process Review	EX-2020-003	Property Management	Open June 30, 2021	1	Michael Mirra Michael Mirra
Project Summary:	<p>This project will review and rewrite:</p> <ol style="list-style-type: none"> 1. Grievance process applicable to those evictions, terminations of rental assistance, and denials of applications for which HUD's rules require a grievance process. 2. Eviction, termination and denial notices; 3. Guidelines for determining if THA will agree to, oppose or refrain from taking any position to a tenant's petition for an Order of Limited Dissemination. 				
83. Evictions - Planning for End of Eviction Moratorium	EX-2020-011	Housing and Supportive Services	Open June 28, 2021	1	April Black April Black
Project Summary:	When the Governor's eviction moratorium ends, Pierce County may see a preceded number of persons facing displacement and homelessness. This project will plan THA's response to this threat to three groups: (1) THA tenants; (2) THA voucher holders; (3) the larger group of low-income households in Pierce County.				
84. Existing			Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
85. Facilities Asset Management	PM-2020-002	Financially Sustainable Operations	Open March 31, 2020	2	Brian McFadden David Dailey
Project Summary:	Document & Track Equipment & Tools				
86. Family Self-Sufficiency (FSS) Case Mgt			Open		
Project Summary:					
87. Family Unification Program (FUP) Vouchers	RA-2017-006		Open		
Project Summary:					
88. Family Unification Program (FUP) Vouchers - Preparing for THA's Application	RA-2019-003	Housing and Supportive Services	Open December 31, 2019	2	April Black Julie LaRocque
Project Summary:	This project will allow THA to submit a strong application to HUD for Family Unification Program (FUP) vouchers and to the state for comparable dollars. THA's unsuccessful 2018 FUP application showed significant weaknesses. This project will fix them.				
89. Family-Friendly THA	HR-2017-018	Administration	Open December 31, 2019	2	Amanda Parent Sharrall Madden
Project Summary:	THA wants to be a workplace that is friendly and supportive to staff who are parents and grandparents and to visiting children. This project will review how we are doing in this way and how we can do better.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
90. Financial Literacy Summer Program	CS-2017-016	Housing and Supportive Services	Open July 10, 2017	2	Caroline Cabellon Nicole Meshesha
		Project Summary:	Financial Literacy week long program.		
91. Fire Systems Installation	PM-2017-012	Property Management	Open January 31, 2018	1	Yvonne Ginoulis Yvonne Ginoulis
		Project Summary:	Work with BCE Engineers to develop an RFP for a new fire systems contract		
92. Forterra's Land Banking Investment Fund	RD-2017-001	Financially Sustainable Operations	Open January 01, 2020	3	Kathy McCormick Roberta Schur
		Project Summary:	Forterra is a nonprofit dedicated to preserving open spaces in the Puget Sound region. It seeks to establish an investment fund to purchase land for affordable housing development. It seeks THA's help to do this. By this project, THA will help Forterra design establish the fund in a way that would benefit THA's own land purchases.		
93. G12	AD-2021-010	Administration	Open	1	Sandy Bigelow Sandy Bigelow
		Project Summary:	G12 communications contract		
94. Gates-TPS 2017	CS-2017-022	Housing and Supportive Services	Open December 31, 2017	1	Sandy Burgess Todd Craven
		Project Summary:	Set up so can use in project management tool to interface to finance		

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
95. Gault School Acquisition	RD-2019-010	Real Estate Development	Open December 30, 2020	2	Kathy McCormick Karen Peterson
Project Summary:	TPS wants to transfer ownership of Gault Elementary to THA for redevelopment. This project focuses on due diligence needed to fully understand the condition of the buildings and the options for future development.				
96. General Services			Open		
Project Summary:					
97. Health Care and Housing Partnerships	CS-2017-032	Housing and Supportive Services	Open December 30, 2020	2	April Black Cacey Hanauer
Project Summary:	Health care providers, including behavioral health care providers, and public and private health care funders recognize that housing is a determinate of health. Housing can save them money. In a reciprocal way, THA recognizes that the people it houses need health care if they are to succeed as tenants in buildings that presume upon their ability to live mostly independently. This project will seek out financing and service partnerships with health care providers and funders.				
98. Heidelberg Sports Complex	RD-2019-001	Real Estate Development	Future January 08, 2021	2	Kathy McCormick Kathy McCormick
Project Summary:	Metro Parks is exploring the possibility of developing a soccer complex with a mixed-use component. They are interested in affordable housing.				
99. Hillsdale - Inter-generational Housing	RD-2015-006	Real Estate Development	Open December 14, 2019	2	Kathy McCormick Steve Clair
Project Summary:	A partnership between THA and, initially MLF to create a multigenerational housing and supportive services community, focused on seniors and foster families. The site is located at the corner of 60th Street and McKinley Avenue and could be developed with 90+ units. The MLF proposal is for 57 units.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
100. Hillsdale Heights Micro Shelter Village	RD-2020-002	Real Estate Development	Open December 31, 2021	2	Vickie Stark Vickie Stark
Project Summary: Lease property at Hillsdale Heights to City of Tacoma for use as a temporary micro shelter village. The City will contract with LIHI to manage the village for individuals experiencing homelessness.					
101. Hilltop - Neighborhood Revitalization Master Planning	RD-2017-016	Housing and Supportive Services	Open December 31, 2021	2	Kathy McCormick Roberta Schur
Project Summary: \$250,000 grant from JPMorgan Chase Foundation is awarded to THDG to support THA's community development work in Hilltop Tacoma: Form Task Force, Create CBO, look at similar models, market study, Alley Activation, business consulting, entrepreneurs, artists, major employers, map current business and property owners, improve and retain homeownership, increase # of residents working in area.					
102. Hilltop - General	RD-2021-001	Real Estate Development	Open December 31, 2025	2	Kathy McCormick Roberta Schur
Project Summary: This project is for accounting purposes only. To be used for expenses that do not fall into a specific project for the Hilltop.					
103. Hilltop - THA Role in Redevelopment Planning Project	RD-2009-005	Real Estate Development	Open March 31, 2017	2	Kathy McCormick Roberta Schur
Project Summary: The Hilltop neighborhood of Tacoma is the city's poorest. It also suffers from decades of public and private underinvestment. The MLK Corridor is the main thoroughfare through the Hilltop. This project will determine THA's role in spurring its redevelopment					
104. Hilltop Lofts	RD-2012-008	Real Estate Development	Open December 31, 2021	2	Kathy McCormick Roberta Schur
Project Summary: The City owns four parcels on the Northwest corner of 12th and MLK Avenue in the Hilltop neighborhood of Tacoma. This project will arrange for THA to acquire, free of charge, two of the parcels pursuant to a development agreement with the City and a private development partner who will acquire the other parcels.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
105. Hilltop Lofts: Financing Supportive Services	EX-2021-001	Administration	Open April 29, 2022	1	April Black April Black
Project Summary:	Horizon Housing is developing and managing Hilltop Lofts for THA to house chronically homeless persons. Financing the necessary services is Horizon Housing's responsibility. This project will manage THA efforts to help find the money.				
106. Hilltop: Inland/ Partnership Consultation	RD-2019-009	Real Estate Development	Open December 31, 2019	1	Kathy McCormick Roberta Schur
Project Summary:	THA is considering a strategy for entering into a public private partnership with Inland Group and Horizon Housing Alliance for the development of the four parcels THA owns that have been master planned through the #DesignTheHill process. This project outlines the Consultation Process to be followed to engage the community around this topic.				
107. Home At Last 30 PBV Units	RA-2021-001	Housing and Supportive Services	Open August 31, 2021	2	Aley Thompson Jessie Beck
Project Summary:	Project Base 30 vouchers into the YWCA's Home At Last new construction development.				
108. Home Purchase, Fix-Up and Reselling Business: Feasibility Assessment	RD-2018-008	Administration	Future April 28, 2021	3	Michael Mirra Kathy McCormick
Project Summary:	This project will explore the feasibility of THA engaging in the business of buying, fixing-up and selling single family homes. THA would do this for three reasons: to protect and enhance neighborhoods, to provide low-income purchasers with responsible homeownership chances, and to make money.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
109. Homeless Encampment: Finding a Spot PM-2018-004		Housing and Supportive Services	Open September 30, 2018	1	Kathy McCormick Kathy McCormick
Project Summary:	In the Spring of 2018, an encampment of homeless persons appeared across the street from THA's administrative building on the Hilltop. It concerns the neighbors, local businesses and users of People's Park. THA fully shares those concerns. THA also is concerned for the campers and their welfare. This project seeks to respond to the encampment in a way that accounts for THA's range of concerns and interests. This project will also model for other neighborhoods and organizations the effective, feasible and humane use of the City's program allowing and encouraging permitted temporary encampments for persons experiencing homelessness.				
110. Homeownership Program Redesign	CS-2013-002	Housing and Supportive Services	Open August 04, 2017	2	Cacey Hanauer Caroline Cabellon
Project Summary:	In the past, HCV homeowners used their monthly voucher payment to pay a portion of the mortgage payment. Starting in 2013, THA will no longer pay a portion of the monthly mortgage for new homeowners. Instead, THA will offer down payment assistance. THA will continue to provide pre-purchase and post-purchase counseling for homeownership program participants.				
111. HOP Case Mgt	CS-2017-012		Open		
Project Summary:					
112. HOP, CHOP, CHAP Subsidy Evaluation 2020	PI-2020-004	Administration	Open July 30, 2021	1	Katie Escudero Katie Escudero
Project Summary:	THA is receiving more funds than budgeted - do we have the ability to deepen the HOP subsidy? This project is to provide an evaluation on the HOP program and if THA should deepen its subsidies and to what levels.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
113. Housing Choice Voucher Landlord Relations	CS-2006-019	Housing and Supportive Services	Open	3	Julie LaRocque Julie LaRocque
Project Summary:	THA has many interests in common with private landlords. First, its Housing Voucher Program depends on their interest and willingness to participate in it. Second, THA is the largest residential landlord in the City of Tacoma. This project will manage THA's relations with landlord and the landlord community to keep it productive.				
114. Housing Funding Opportunities - Understanding Them and Seeking Them	EX-2021-003	Housing and Supportive Services	Open September 01, 2021	1	April Black April Black
Project Summary:	In this year of COVID, the federal, state and local governments have planned to provide substantial new dollars for the provision, purchase, and development of affordable housing. This project will track those opportunities for THA and seek them out.				
115. Housing Policy Committee	PI-2020-002	Housing and Supportive Services	Open	1	Ava Pittman Ava Pittman
Project Summary:	This project is designed to plan and track housing policy/procedural development and updates. The work outlined within this project will come from the Housing Policy Committee.				
116. HR Policy Update	HR-2018-005	Administration	Open December 31, 2020	2	Sharrall Madden Barbara Tanbara
Project Summary:	Update HR policies so that they comply with all current and new federal, state and local regulations and serve the agency as it is today.				
117. HUD FSS-2017	CS-2017-002	Housing and Supportive Services	Open December 31, 2017	1	Ken Shalik Ken Shalik
Project Summary:	HUD FSS Grant				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
118.HUD HCV Audit Findings	RA-2017-011	Administration	Open November 30, 2017	1	Adam Ydstie Adam Ydstie
Project Summary: This project exists to manage an inter-departmental response to the recent findings from the HUD HCV Audit dated 2017-09-19.					
119.Implement Paperless Operations	RA-2021-004	Administration	Open December 30, 2022	2	Aley Thompson Aley Thompson
Project Summary: Transition Rental Assistance Operations away from paper to promote remote work and improved customer service					
120.Improve Inspections Operations & Technology	RA-2021-006	Housing and Supportive Services	Open December 30, 2021	2	Aley Thompson Adam Ydstie
Project Summary: Research & identify Salesforce add-ons to meet the needs of Inspections operations					
121.Inactive Voucher Programs	RA-2017-001		Open		
Project Summary:					
122.Inclement Weather Team	PM-2019-007	Property Management	Open March 29, 2019	1	Brian McFadden David Dailey
Project Summary: Confirm members of the team and determine approach, equipment, and materials needed to effectively respond to weather emergencies.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
123. Increased Coordination between Client Services and Property Management	CS-2013-005	Housing and Supportive Services	Open	1	Cacey Hanauer Caroline Cabellon
Project Summary:	Increase coordination between REMHS and CS in order to increase involvement of public housing and rental assistance clients in CS services.				
124. Innovative Housing Design and Construction Techniques	RD-2012-001	Real Estate Development	Future	2	Michael Mirra Michael Mirra
Project Summary:	This project will canvas, convene and consider informed views about alternative designs, methods and material for the construction of affordable housing that would be significantly less expensive than our present practices. This project will allow THA to make some informed choices for how it designs and builds housing.				
125. Inspections Back log (Covid & Delinquent)	RA-2021-003	Housing and Supportive Services	Open December 30, 2022	1	Aley Thompson Adam Ydstie
Project Summary:	THA must address the backlog of inspections not conducted due to the Covid-19 Pandemic				
126. Inventory and Warehouse Management Implementation	PM-2014-001	Property Management	Open December 31, 2018	1	Frankie Johnson Justin Gonzales
Project Summary:	This project will organize the warehouse and storage spaces at each of THA's properties, organize the THA-owned Maintenance vehicles, and create an inventory management system for THA's Property Management division.				
127. Investment Fund for Affordable Housing: Explore Its Feasibility	EX-2018-011	Administration	Open January 01, 2022	2	April Black April Black
Project Summary:	This project will explore the feasibility of creating an investment fund for the purpose of raising money and providing a return on investment for the purchase or development in the Tacoma area of housing for low-income persons.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
128.IT - Barracuda Email Unstubbing	AD-2019-007	Administration	Open June 30, 2020	2	Celeste Ramirez Celeste Ramirez
Project Summary: Project created to track the ongoing work with Barracuda to unstub email that was archived with the Barracuda Message Archiver.					
129.IT - Genetec Implementation	AD-2017-014	Administration	Open December 31, 2024	1	Mathew Hagadone Celeste Ramirez
Project Summary: Security project in partnership with Genetec					
130.IT - Ongoing Oversight of THA's Reasonable Accommodation Patent	AD-2018-001	Financially Sustainable Operations	Open February 15, 2022	2	Sandy Burgess Sandy Burgess
Project Summary: THA submitted a full patent application to the US patent office in August 2013 in order to retain the rights to sell and profit from the system it designed. This project oversees the ongoing management and oversight of the patent.					
131.IT - Performance Evaluation Upgrade	AD-2019-011	Administration	Future August 31, 2020	2	Celeste Ramirez Celeste Ramirez
Project Summary: The current server housing THA's PE system is failing. The code used to build this system is also very old. We were unable to find someone who can program in this language. The upgraded system will look and feel the same, but the backend code will be modern and more manageable.					
132.IT - Security Compliance with NIST 800-171	AD-2021-008	Administration	Open October 01, 2021	1	William Morse William Morse
Project Summary: This is an effort to bring the THA into compliance with Gramm-Leach-Bliley Act of 1999 which requires the implementation of the NIST 800-171 security standards.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
133.IT PBX Rollout	AD-2021-002	Administration	Open February 15, 2021	1	Mathew Hagadone Celeste Ramirez
Project Summary:	Upgrade organization telephone system to PBX (Private Branch Exchange) system. Users will be able to communicate internally and externally using Voice Over Internet Protocol (VOIP).				
134.ITS (IT Ticketing System)	AD-2021-005	Administration	Open December 31, 2021	1	Aaron Tripp Celeste Ramirez
Project Summary:	Research IT Ticketing System & select tool that best meets THA needs.				
135.James Center North Operations	RD-2017-017	Real Estate Development	Open January 01, 2021	3	Joshua Jorgensen Joshua Jorgensen
Project Summary:	This project will be used as a placeholder for file storage until a redevelopment timeline has been approved				
136.James Center North Predevelopment	RD-2017-020	Real Estate Development	Open October 25, 2023	3	Joshua Jorgensen Roberta Schur
Project Summary:	THA will efficiently develop a site master plan to include mixed income housing, in a mixed-use development to encourage access to employment, access to amenities, access to education and equitable inclusion that primarily serves families and individuals searching for safe, clean attractive and affordable housing. Its work will promote the community's development. Its housing and commercial properties will be financially sustainable, environmentally innovative, and attractive.				
137.Jefferson Square - Mod Rehab	RA-2017-007		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
138.Key Control (FIC/902)	PM-2019-009	Property Management	Open December 27, 2019	2	David Dailey David Dailey
Project Summary:	Establish a system of Key Control for two properties, 902 S. L St & 1724 E. 44th (902/FIC)				
139.Landscape Contract for 902 Bldg	PM-2017-016	Financially Sustainable Operations	Open April 30, 2018	2	Frankie Johnson Yvonne Ginoulis
Project Summary:	Contract with a landscaping company to repair and redesign front of bldg				
140.Laserfiche Electronic Content Management System (ECM)	AD-2020-008	Administration	Open	1	Celeste Ramirez Celeste Ramirez
Project Summary:	Implement Laserfiche Electronic Content Management System for organization.				
141.Lease Revision 2019	PM-2018-006	Property Management	Open December 31, 2019	1	Yvonne Ginoulis Yvonne Ginoulis
Project Summary:	To revise the existing lease to include all facets of housing.				
142.Leasing Team Pilot	PM-2018-001	Property Management	Open May 01, 2018	2	Frankie Johnson Marquis Jenkins
Project Summary:	Pilot project to measure performance of a dedicated leasing team versus a centralized one				
143.Local Program Vouchers	RA-2017-008		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status	Priority	Assigning Person
			Due Date		Project Manager
			Closed Date		
144. Local Program Vouchers -- Fixed Sub	RA-2017-021		Open		
Project Summary:					
145. Long Range Revenue Forecast	FD-2006-017	Administration	Open	2	April Black Ken Shalik
Project Summary:	This project will forecast THA's long range revenues. The effort to do this will try to account for the many transitions and uncertainties facing THA, including the changing HUD funding formulas, the changing appropriation levels, the changing THA portfolio and the changing expenses.				
146. Lorraine Viers - Orientation as HR Director	EX-2021-006	Administration	Open July 30, 2021	3	Sha Peterson Sha Peterson
Project Summary:	Lorraine Viers joins THA as the new Human Resources Director. This project will manage her onboarding and her orientation to THA and to her responsibilities and her introduction to her new colleagues at THA.				
147. Low Rent			Open		
Project Summary:					
148. Mainstream Vouchers	RA-2019-005	Housing and Supportive Services	Open	1	Julie LaRocque Julie LaRocque
Project Summary:	N/A				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
149.Maintenance Quality Control	PM-2019-008	Property Management	Open December 27, 2019	2	David Dailey David Dailey
Project Summary: Create a program that checks the quality of work, response, and customer service of the maintenance team.					
150.Maintenance Standardization of Charges	PM-2014-010	Property Management	Open June 30, 2017	1	Frankie Johnson Tiffany Price
Project Summary: The purpose of this project is to establish a schedule of standardized charges for our property management department. This will address standard materials costs to tenants, as well as standardized maintenance work functions. By accomplishing this, we will be able to provide consistent charges to all tenants, no matter which property they reside. Additionally, it will decrease the turnaround time for issuing charges and will also provide tenants a precise billing schedule that they can refer to. Finally, this project will allow THA staff to accurately estimate vacant unit charges for materials and work needed.					
151.Market Rate	PM-2017-003		Open		
Project Summary:					
152.MEOP			Open		
Project Summary:					
153.Michael Mirra's Retirement - Administrative Transition	EX-2021-007	Administration	Open July 05, 2021	1	Sha Peterson Sha Peterson
Project Summary: Michael Mirra retires as THA's Executive Director. This project will manage the administrative details of this transition.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
154. Michael Mirra's Retirement - Transition to April Black et al	EX-2021-005	Administration	Open July 05, 2021	1	Michael Mirra Michael Mirra
Project Summary:	Michael Mirra, after 17 years as THA's Executive Director, is retiring, effective July 5th. The THA Board will appoint April Black as Interim E.D. . This project will manage the transition.				
155. Michaels Plaza	RD-2020-004	Real Estate Development	Open March 31, 2021	2	Kathy McCormick Kathy McCormick
Project Summary:	Possible acquisition of a 15 Acre retail strip in the Tacoma Mall Area. This parcel would be acquired for future redevelopment as a mixed use site.				
156. Mod Rehab			Open		
Project Summary:					
157. Mortgage Brokerage Services	CS-2008-001	Financially Sustainable Operations	Future	2	April Black Cacey Hanauer
Project Summary:	THA will assess whether it should and could offer mortgage brokering services to low-income households to increase their responsible and affordable homeownership opportunities. If this service is both desirable and feasible, this project will also devise a business plan.				
158. Moving to Work Plan 2020	PI-2019-003	Housing and Supportive Services	Open October 15, 2019	3	Ava Pittman Ava Pittman
Project Summary:	This project will prepare and implement the 2020 MTW Plan.				

Project Name	Number	Strategic Objective	Status	Priority	Assigning Person
			Due Date		Project Manager
			Closed Date		
159.MRVP Mobile			Open		
Project Summary:					
160.MRVP Regular			Open		
Project Summary:					
161.Near-Elderly Disabled Program (NED)	RA-2017-009		Open		
Project Summary:					
162.Neil Is Testing	AD-2017-008	Administration	Future	3	eightCloud eightCloud
Project Summary:	Neil Is Testing Outline Issue				
163.Neil Is Testing 2	AD-2017-009	Administration	Future	3	eightCloud eightCloud
Project Summary:	Neil is testing outline issues				
164.Neil is Testing 3	AD-2017-010	Administration	Future	1	eightCloud eightCloud
Project Summary:	Outline numbering testing				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
165.Nick Tolley - Orientation as Communications Manager	EX-2021-002	Administration	Open August 31, 2021	1	April Black Sha Peterson
Project Summary:	Nick Tolley joins THA as its new Communication Manager! This project will manage his onboarding and his orientation to THA and to his responsibilities, and his introduction to his new colleagues at THA.				
166.NIST Cybersecurity Assessment	AD-2021-003	Administration	Open December 31, 2021	1	Aaron Tripp Celeste Ramirez
Project Summary:	CI Security to perform computer and network security assessment of THA and provide a point-in-time snapshot of THAs security posture.				
167.No Program Assigned			Open		
Project Summary:					
168.Onboarding Improvement	HR-2016-004	Administration	Open June 30, 2020	1	Amanda Parent Sharrall Madden
Project Summary:	Provide new hires with a more robust and formal introduction to THA.				
169.OpenDoor Assessment	AD-2020-006	Administration	Open	2	Celeste Ramirez Celeste Ramirez
Project Summary:	Technical assessment of OpenDoor system integrity.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
170.Operating Reserves Litigation	FD-2017-005	Financially Sustainable Operations	Open December 31, 2018	2	Ken Shalik Ken Shalik
Project Summary: Underfunded by HUD for 2012 Operating Subsidies. Second round of lawsuits to attempt to recoup after successful first round.					
171.Organize Property Management Folder	PM-2017-021	Property Management	Open December 31, 2018	2	Frankie Johnson Yvonne Ginoulis
Project Summary: Create a new folder sepearate from Housing Ops folder for Property Management					
172.Payment Standards Analysis	RA-2017-010	Housing and Supportive Services	Open	1	Julie LaRocque Julie LaRocque
Project Summary: Payment standards are used to calculate the housing assistance payment (HAP) that THA pays to the owner on behalf of the family leasing the unit. THA is allowed to establish its own schedule of payment standard amounts by bedroom size. The range of possible payment standard amounts is based on HUD's published fair market rent (FMR) schedule.					
173.Payroll Service review	FD-2011-003	Administration	Future December 31, 2019	2	Ken Shalik Ken Shalik
Project Summary: Current payroll system is challenging both to staff and administratively. The goal is to review, go out for RFP, and possibly change to a system that better suits the agencies needs in 2012					
174.PBS - Campbell Court	RA-2019-007	Housing and Supportive Services	Open December 31, 2019	1	Eric Lane Eric Lane
Project Summary: THA has implemented a new program known as 'Property Based Subsidies'. This has been implemented at Highland Flats (formally Tiki), Crosspointe, and Koz on Market. This project is for three more properties that will be added to this program: Campbell Court					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
175.PBS - Cascade Communities	RA-2019-006	Housing and Supportive Services	Open December 31, 2019	1	Eric Lane Eric Lane
Project Summary:	THA has implemented a new program known as 'Property Based Subsidies'. This has been implemented at Highland Flats (formally Tiki), Crosspointe, and Koz on Market. This project is for three more properties that will be added to this program: Campbell Court, Cascade Park Vista, and Cascade Gardens.				
176.PBS - Koz on Puyallup	RA-2019-008	Housing and Supportive Services	Open December 31, 2019	1	Eric Lane Eric Lane
Project Summary:	THA has implemented a new program known as 'Property Based Subsidies'. This has been implemented at Highland Flats (formally Tiki), Crosspointe, and Koz on Market. This project is for three more properties that will be added to this program: Koz on Puyallup				
177.Performance Evaluation-research and procure	HR-2016-001	Administration	Future October 02, 2017	2	Amanda Parent Amanda Parent
Project Summary:	A new performance evalaution system will be researched and purchased. The process of finding the right new evalaution will be vetted with OPEIU, Trades and nonrep employees.				
178.Performance Measures for Client Services	CS-2018-007	Housing and Supportive Services	Future September 14, 2018	1	Cacey Hanauer Cacey Hanauer
Project Summary:	Develop key performance measures for all of Client Services to track in order to show return on investment regarding case management.				
179.Pierce County Affordable Housing Policy	EX-2020-009	Advocacy and Public Education	Open	2	April Black April Black
Project Summary:	The Pierce County Council is considering new policies for the preservation and creation of affordable housing. It has convened several advisory groups for the purpose. It has asked THA to serve on them. This project will manage that participation.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
180. Playground Inspection Procedure	PM-2017-003	Property Management	Open December 31, 2017	1	Justin Gonzales Frankie Johnson
Project Summary:	Partner with Metro Parks to assess, monitor and maintain playground equipment across the portfolio.				
181. PPE	PM-2019-005	Property Management	Open April 05, 2019	1	Brian McFadden David Dailey
Project Summary:	Purchase and distribute Personal Protective Equipment to each THA maintenance technician.				
182. Preventive Maintenance Schedule	PM-2017-002	Property Management	Open	1	Frankie Johnson Justin Gonzales
Project Summary:	All property portfolios need a preventive maintenance schedule and a system to implement it. This will keep down maintenance costs and save money in the long run. Funders and investors and regulators also expect to see such a schedule and system for the same reason. This project will create such a schedule and implement it.				
183. Prisons: How Can THA Serve People Coming From the Prison System	PI-2015-017	Housing and Supportive Services	Future	2	Michael Mirra April Black
Project Summary:	Washington has a sizable number of people who have spent time in prison. They face notable challenges finding jobs and housing. They have families who share these challenges. This project will examine how THA can better serve them and their families by removing unnecessary barriers to its programs and by creating or funding other programs.				
184. Procurement Compliant	AD-2019-005	Administration	Future December 31, 2022	2	Sandy Burgess Jennifer Rickey
Project Summary:	Bring THA compliant with CFR 200 in actions and to train staff in depth.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
185.Project Based State Program	RA-2017-016		Open		
Project Summary:					
186.Project Based Vouchers	RA-2017-002		Open		
Project Summary:					
187.Project Management Data Base	EX-2006-026	Administration	Open December 01, 2021	2	April Black April Black
Project Summary:	THA has commissioned the creation of a data base for several purposes. (i) to link projects with agency mission statements and strategies; (ii) to allow managers and staff to track projects and assignments; (iii) to allow project teams and other staff to share information about a project; (iv) to produce attractive reports. Having created the product in FileMaker Pro, THA recreated it in SalesForce. The recreation is not entirely satisfactory because of the limitations of SalesForce. This project remains open to fix those problems either in Salesforce or another platform.				
188.Project Management Tool: Consider Replacement	AD-2020-007	Administration	Future	1	Celeste Ramirez Celeste Ramirez
Project Summary:	Implement new project management tool for THA organization that is native to OpenDoor, intuitive, and delivers ease of use for end-users.				
189.Property Based Subsidy	RA-2018-003		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
190. Property Management Department Business Process Improvement (BPI)	PM-2013-003	Financially Sustainable Operations	Open December 31, 2014	2	Frankie Johnson Frankie Johnson
Project Summary:	We have hired a Warehouse Improvement Analyst, a Lead Property Management Assistant (PMA) and we are hiring a Business Process Improvement Analyst.				
191. Public Housing	PM-2017-008		Open		
Project Summary:					
192. Public Housing: Adding Public Housing Units THA's Faircloth Allotment	AD-2017-018	Real Estate Development	Future December 31, 2020	1	Sandy Burgess Cindy Norton
Project Summary:	Every PHA in the nation has an allotted number of public housing units it may have. This is called the Faircloth number. THA is under that number. THA may create more public housing units up to that number and receive the additional subsidy it means. HUD has also confirmed that we can then immediately convert those units to Section 8 units under a RAD conversion. This project will determine if we should do this and if so when, how much and how. This project will also get the work done.				
193. Rapid Rehousing	CS-2017-014		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
194. Real Estate Development Activities Tool Kit	EX-2017-011	Financially Sustainable Operations	Future March 31, 2017	2	Michael Mirra Michael Mirra
Project Summary:	THA has several development tools, e.g. bonds, its status as a Community Development Entity, its ability to borrow money, its own sources of capital, its status as a public development authority. This project will produce a written analysis of these tools and describe how THA might use them for at least three purposes: (i) to further develop of its own properties; (ii) to promote community development; (iii) to make money.				
195. Real Estate Development Opportunities and Initiatives to Consider	RD-2006-002	Real Estate Development	Open	1	Kathy McCormick Karen Peterson
Project Summary:	THA seeks development opportunities in Tacoma and Pierce County. It seeks properties to further its strategic objectives, including: (i) more units throughout the housing continuum; (ii) properties that will produce an income; (iii) mixed-use, mixed-income and mixed-tenure properties. It also seeks partnerships with other non-profits or developers for these purposes.				
196. Rebuild of Inspector's App	AD-2021-004	Administration	Open December 31, 2021	1	Celeste Ramirez Celeste Ramirez
Project Summary:	Rebuild the Inspectors App on OpenDoor according to their business requirements.				
197. Recruitment for Executive Director	HR-2021-003	Administration	Open August 31, 2021	1	Amanda Parent Lorraine Viers
Project Summary:	Recruitment for next THA Executive Director				
198. Reenvision Waitlist Operations with an Applicant Portal	RA-2021-002	Housing and Supportive Services	Open	3	Aley Thompson Aley Thompson
Project Summary:	A project to reconsider waitlist openings and operations				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
199. Referral and Information Plan	RA-2017-013	Administration	Open May 31, 2019	2	Julie LaRocque Adam Ydstie
Project Summary:	This project will review and revise how THA provides information and referral assistance to people seeking help. THA turns down most requests for help for lack of resources. Many of these people are in crisis. THA needs to be a reliable and humane source of information and referral to help people find other resources in the community. This project will see to it.				
200. Rent Market Survey	RA-2018-001	Financially Sustainable Operations	Future	1	April Black Adam Ydstie
Project Summary:	This project exists to determine whether THA should commission a market survey to contest HUD's FMRs for our area in order to increase our HAP and to also outline how THA will get it done if we choose to petition.				
201. Rental Assistance 5 year voucher utilization projection.	RA-2020-001	Financially Sustainable Operations	Open May 29, 2020	1	Julie LaRocque Julie LaRocque
Project Summary:	Determine the 5 year projected voucher utilization for HCV, PBV, PBS, HOP and for HOP subsidy increase.				
202. Resident Councils and Advisory Councils Civic Participation	PM-2007-003	Property Management	Future	2	Michael Mirra April Black
Project Summary:	THA recognizes that involvement by tenants and HCV participants in their communities and programs help make THA more effective. Resident councils and advisory boards help this to happen. This project will help create and sustain effective councils and advisory boards of THA tenants and voucher holders.				
203. Residential Lease Rewrite	PM-2017-005	Property Management	Open October 31, 2017	2	Frankie Johnson Gretchen Sinkula
Project Summary:	THA will re-write its residential lease to comply with State and Federal law. It will also be clearer for staff and tenants and allow THA to enforce the lease in an effort to keep our tenants safe.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
204. Review Transfer Waitlist Policy & Operations	RA-2021-005	Administration	Open October 30, 2022	3	Aley Thompson Aley Thompson
Project Summary: Review & revise THA's transfer waitlist policies for the PBV portfolio					
This project will improve the overall management of THA's transfer waiting list. It will devise a strategy to serve the households that have been on the list in excess of the time stated in our policies, create a regular review process, and take into account the impacts on property budgets.					
205. Rite Aide	RD-2018-005	Real Estate Development	Open April 09, 2019	1	Kathy McCormick Roberta Schur
Project Summary: Forterra offered to acquire the Rite Aid site on behalf of THA. This project would be developed as part of the Housing Hilltop effort.					
206. RM - THA Safety and Security Review	AD-2018-013	Administration	Future September 30, 2020	1	Sandy Burgess Ginger Peck
Project Summary: Evaluate current Safety and Security concerns and Implement changes					
207. Safety Data Sheets	PM-2019-004	Property Management	Future July 31, 2019	3	Greg Wright David Dailey
Project Summary: Establish SDS books in each appropriate location.					
208. Salishan as a Diverse, Mixed Income Neighborhood: Making It Work As a Community	EX-2017-008	Housing and Supportive Services	Future June 17, 2017	3	Michael Mirra Michael Mirra
Project Summary: Salishan is a mixed income community. It has home owners and renters. It is the region's most diverse neighborhood. Its success as a community requires particular attention. A growing body of literature, practice and expertise for that purpose is available. This project will consider those resources and put them to work at Salishan.					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
209.Salishan Detached Storage	PM-2020-005	Property Management	Open September 30, 2020	3	David Dailey David Dailey
Project Summary:	Evaluate storage units for disposal				
210.Salishan Dryer Vent Moisture	PM-2017-020	Property Management	Open January 31, 2018	1	Justin Gonzales Justin Gonzales
Project Summary:	Dryer vents with 2nd floor exhaust, have been causing damage behind the fascia and siding around the vent.				
211.Salishan Foreclosure Prevention	RD-2012-004	Housing and Supportive Services	Future	2	Michael Mirra Michael Mirra
Project Summary:	This project seeks to develop partnerships, support programs, resources and whatever other program elements may be needed in order to ensure that home owners at Salishan are able to keep up with their mortgage commitments and remain successful home owners.				
This project is intended to be small in scale, providing support to a small number of homeowners so that it may be a demonstration for similar future efforts led by THA.					
212.Salishan Lot Sales	RD-2019-005	Real Estate Development	Open July 01, 2019	2	Stacey Lopez Roberta Schur
Project Summary:	Sale of 7 lots in Section 2B of Salishan				
213.Salishan Neighborhood Center Development	RD-2007-008	Real Estate Development	Open December 31, 2017	1	Kathy McCormick Kathy McCormick
Project Summary:	New Salishan will have a Community Center of several buildings that will include a variety of youth and adult activities and services.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
214.Salishan Paint	PM-2017-006	Property Management	Open September 29, 2017	2	Frankie Johnson Justin Gonzales
Project Summary:	2017 Salishan Paint Project				
215.Salishan Shine	EX-2007-022	Property Management	Future	2	Michael Mirra Michael Mirra
Project Summary:	This project will design, raise money for and install additional features to Salishan and THA's other properties to make them shine. It will do this in a way that will engage the residents and neighbors, especially children, and help them unite as communities.				
216.Salishan Water Conservation Project	PM-2016-002	Property Management	Open November 30, 2017	2	Frankie Johnson Frankie Johnson
Project Summary:	To conserve water throughout the Salishan property				
217.Segregation of Seniors and Younger Disabled Persons in THA High Rises	PI-2008-001	Administration	Future	3	Michael Mirra April Black
Project Summary:	Federal law permits THA to segregate by building or by floor the seniors from the younger disabled persons in its High Rises that are presently reserved for both. There are reasons why this would be helpful and popular, as well as unhelpful and unpopular. This project will determine whether THA shall do this and, if so, get it done.				
218.Selling Property Inspection Services	CS-2007-010	Financially Sustainable Operations	Future	2	Greg Claycamp Julie LaRocque
Project Summary:	This project will explore, and if appropriate, pursue the business of selling property inspector services to the City of Tacoma. The City may need inspectors if it passes a new licensing ordinance for landlords that will require all rental properties to pass inspection.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
219.Selling Property Management Services	PM-2007-004	Financially Sustainable Operations	Future	2	Michael Mirra April Black
Project Summary:	This project pertains to THA's efforts to sell its property management services to earn money. This project will devise a business plan for that purpose.				
220.Sexual Harassment Awareness	HR-2018-004	Administration	Future	1	Toby Kaheiki Toby Kaheiki
Project Summary:	Develop regular and recurring awareness training for all THA staff.				
221.Shiloh Baptist Church Residential Development	RD-2019-011	Real Estate Development	Open April 30, 2024	1	Kimberly Gomez Roberta Schur
Project Summary:	Redevelopment of residential property				
222.Sidewalk Chalk Project	EX-2020-004	Housing and Supportive Services	Open September 01, 2021	2	April Black April Black
Project Summary:	This project will deliver to every THA tenant with children (i) a supply of colorful sidewalk chalk and (ii) a warm encouragement for the children to color their sidewalks, walkways, alleys and parks with chalk. It will deliver bubbles to residents of the senior buildings. This project will help to spruce up life during a pandemic.				
223.Sound Transit As a Source of Affordable Housing Resources	RD-2018-009	Real Estate Development	Open July 28, 2019	2	April Black April Black
Project Summary:	Sound Transit has legal obligations to provide land and other resources for affordable housing development along its transit routes. This project will understand this and elicit those resources for THA.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
224.Special Purpose Vouchers	RA-2017-010		Open		
		Project Summary:			
225.Spray Park in Salishan	PM-2016-003	Property Management	Open May 31, 2018	2	Frankie Johnson Frankie Johnson
		Project Summary:	Get a spray park built at Salishan.		
226.Strategic Plan Digital Dashboard	PI-2017-001	All	Future	2	April Black Karen Bunce
		Project Summary:	THA will devise a Digital Dashboard that reflects the Strategic Plan data metrics for our established performance measures. The goal is a visual tool that is easy to understand and will aid in making decisions related to our strategic directives and the work of the agency.		
227.Strategic Plan for THA's Real Estate Development	RD-2014-014	Real Estate Development	Open July 06, 2020	1	April Black Kathy McCormick
		Project Summary:	THA needs a strategic plan to guide its real estate development over the next five years. The plan shall seek to fulfill the performance measures that THA Board set for the real estate strategic objective. This project will devise the plan.		
228.Strategic Planning Process Design and Initial Implementation	EX-2008-021	Administration	Future	1	Michael Mirra Michael Mirra
		Project Summary:	THA will devise an annual process for the Board to set and review the agency's mission and strategic direction, with appropriate performance measures. The goal is a process that is manageable, reflective and enjoyable. This project will also devise the on-line system for recording these strategic directives and linking them with the work of the agency.		

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
229. Survey-EE Opinion	HR-2013-010	Administration	Future April 30, 2018	1	Amanda Parent Amanda Parent
Project Summary:	The HR dept will use the same opinion survey used in previous years one last time. This will allow THA to see comparative data from previous survey years.				
230. Tacoma Community College James Center North Master Lease	RD-2019-008	Real Estate Development	Open January 01, 2020	1	Joshua Jorgensen Joshua Jorgensen
Project Summary:	This project will outline the proposed process for coordinating with Tacoma Community College in order to determine their participation in the redevelopment of James Center North.				
231. Tacoma Family Medicine	CS-2017-030	Housing and Supportive Services	Open December 31, 2018	3	Cacey Hanauer Caroline Cabellon
Project Summary:	Tacoma Family Medicine Resident Director has expressed interest in learning about possible volunteer opportunities at THA				
232. Tacoma Gang Reduction Executive Steering Committee	EX-2013-005	Advocacy and Public Education	Open June 30, 2022	3	April Black April Black
Project Summary:	The City of Tacoma City Council convened a Gang Reduction Task Force. An Executive Steering Committee oversee its efforts. The Council asked THA through its executive director to serve on that Committee.				
233. Tacoma-Pierce County Affordable Housing Consortium	EX-2006-038	Advocacy and Public Education	Open	3	April Black April Black
Project Summary:	The Tacoma-Pierce County Affordable Housing Consortium (AHC) is a membership organization of developers, funders, managers or supporters of affordable housing in Pierce County. THA is a founding member. The AHC is a useful forum for advocacy, mutual support and information sharing. This project pertains generally to THA's membership.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
234. Tax Credit Public Housing	PM-2017-004		Open		
Project Summary:					
235. Tax Credit RAD	PM-2017-005		Open		
Project Summary:					
236. Tax Credit RAD Vouchers	RA-2017-019		Open		
Project Summary:					
237. Tax Credit Risk Review - Review of Tax Credit for Risk from Aggregators	AD-2019-012	Administration	Open February 28, 2020	1	April Black Sandy Burgess
Project Summary:	Investment firms are purchasing the investor interest in LIHTC deals. They then exploit any ambiguity in the law or the deal documents to contest the nonprofit developer's right to purchase the property at the end of the 15 year compliance period. This project will assess and manage such risks in THA's LIHTC deals.				
238. Tax Credit Section 8	PM-2017-006		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
239. Tax Credit Section 8 THA	PM-2017-009		Open		
Project Summary:					
240. Tax Credit Unsubsidized	PM-2017-007		Open		
Project Summary:					
241. Tax Credit Unsubsidized THA	PM-2017-024		Open		
Project Summary:					
242. TEMPLATE Project Outline: Real Estate Development Project	RD-2014-013	Real Estate Development	Open February 15, 2020	1	Kathy McCormick Kathy McCormick
Project Summary: This project will design a project outline template for real estate development projects. This project will support the planning and implementation of such projects and the coordination with other departments.					
243. Tenant Based Homeownership Program	RA-2017-004		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
244. Tenant Protection Policy Proposals: City of Tacoma - State of Washington	EX-2018-005	Advocacy and Public Education	Open June 30, 2023	2	April Black April Black
Project Summary:	The Tacoma City Council and the Washington State legislature have been considering important legislative proposals to enhance the rights of residential tenants. THA has several interests in the matter including its interests as the City's largest landlord and its mission to advocate for the housing needs of low-income residents. This project will find and manage THA's place in these civic discussions. In the state discussions, THA is also helping to represent the Association of Washington Housing Authorities.				
245. Tenant Protection Vouchers	RA-2017-011		Open		
Project Summary:					
246. Tenant Protection Vouchers -- Enhanced	RA-2017-012		Open		
Project Summary:					
247. THA Job Description revision project	HR-2019-001	Administration	Future November 30, 2020	2	Barbara Tanbara Barbara Tanbara
Project Summary:	This project has goals. Transition writing THA job descriptions (jd's) to other HR dept members. Improve jd's so that each jd clearly represents the work of the position. Ensure that our jd's enhance the recruitment process by making our jd's more succinct, eliminating unnecessary language, and clarifying the duties.				
248. THA Merger or Combination with Other PHAs: Consultation and Study	EX-2011-007	Administration	Future	2	Michael Mirra April Black
Project Summary:	This project will review the feasibility, advantages and disadvantages of THA's merger with surrounding non-MTW public housing authorities for two purposes: (i) to confer on their programs and communities the advantages of MTW status; (ii) to save money with by combining administrative operations.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
249.THA Restructuring	EX-2015-013	Administration	Future	1	Michael Mirra April Black
Project Summary:	This project will consider alternative ways THA may organize its activities for several purposes: (i) to better protect its reserves from HUD recapture; (ii) to make it more appealing to donors and investors; (iii) to reduce its cost; (iv) improve its efficiency.				
250.THA Urban Forestry Program (Tree Services)			Open		
Project Summary:					
251.THDG: Refresh its Purpose, By-Laws and Board	EX-2018-010	Administration	Open September 01, 2021	2	April Black April Black
Project Summary:	The Tacoma Housing Development Group (THDG) is THA's nonprofit affiliate. THA uses it for housing development financing and to receive donations. This project will: (1) consider additional uses for THDG; (2) review its by-laws; (3) fill the vacant Board seat that present by-laws reserve for a community member.				
252.The End of the Eviction Moratorium (see EX-2020-011)	RA-2021-007	Housing and Supportive Services	Open	1	Aley Thompson Aley Thompson
Project Summary:	Plan for impacts to Rental Assistance with the lifting of the eviction moratorium				
253.The Rise at 19th Lease Up	PM-2020-006	Administration	Open March 01, 2021	1	Aley Thompson Aley Thompson
Project Summary:	THA will lease up a 64 unit housing development in the Hilltop with households earning less than 60% AMI. Set-asides: 14 units for homeless households, 14 units have ADA features and 18 units will be project-based VASH. THA seeks to prioritize the use of its transfer waitlist to fill vacant units.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
254. Theater Tickets for THA Clients	CS-2017-025	Housing and Supportive Services	Open April 30, 2019	2	Cacey Hanauer Caroline Cabellon
Project Summary:	The Broadway Center for Performing Arts in Tacoma wold like to offer THA clients free tickets to performances at its downtown theaters. Taking effective advantage of this generous offer will require planning. This project will provide it.				
255. Tiki Apartments, maintain affordability	RA-2018-002	Housing and Supportive Services	Open December 31, 2018	1	April Black April Black
Project Summary:	This project will work with the owners of the Tiki Apartments to attempt to maintain the affordability of the property post-rehabilitation.				
256. Timekeeping Project	HR-2016-005	Administration	Future December 27, 2019	1	Amanda Parent Amanda Parent
Project Summary:	In response to a 2015 DOL Wage/Hour audit, THA agreed to purchase and implement an improved timekeeping system for Non-exempt staff.				
257. Top Places to Work Designation	HR-2008-003	Administration	Future	2	Michael Mirra Barbara Tanbara
Project Summary:	The Business Examiner annually surveys employees of companies and organizations in the South Puget Sound region to identify the				
258. Traditional HCV Vouchers MTW	RA-2017-017	Advocacy and Public Education	Open	1	Julie LaRocque Julie LaRocque
Project Summary:	N/A				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
259. Traffic Calming Measures in Salishan	PM-2017-002	Property Management	Open November 30, 2017	2	Frankie Johnson Frankie Johnson
Project Summary:	Project will identify areas in the salishan community that can add traffic calming designs. These designs are to act as an saftey measure to slow traffic down in high traffic areas in the community.				
260. Training for PM Staff	PM-2017-014	Property Management	Open	2	Frankie Johnson Yvonne Ginoulis
Project Summary:	Plan and coordinate training needs for PM Staff				
261. Training: Trauma Informed Care and Motivational Interviewing	CS-2013-007	Housing and Supportive Services	Open July 28, 2017	1	Cacey Hanauer Caroline Cabellon
Project Summary:	Community Services is moving toward more consistent, measurable practices and outcomes. To accomplish this,we are creating a common service model with a therapeutic theory and strategic practice. Trauma Informed Care and Motivational Inteviewing provide this theory and strategy. The strategy will be reflected in all service planning and reporting documents.				
262. Transition Accounts Receivable to new platform	FD-2021-002	Administration	Open December 31, 2021	1	Ken Shalik Ken Shalik
Project Summary:	Current AR platform for tenants is not user friendly and needs to be replaced				
263. Tree Services - THA Wide	PM-2012-004	Environmental Responsibility	Open December 30, 2025	1	Yvonne Ginoulis Yvonne Ginoulis
Project Summary:	This project will develop a plan to manage trees on THA and Salishan property, increase their number, and create a sustainable, lush, and attractive canopy of trees. This plan will have a budget and a schedule. It will imbed the plan and its implementation into the appropriate business processes.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
264.TSHAP Expansion Design 2019-2021	PI-2019-001	Advocacy and Public Education	Open December 31, 2021	1	Katie Escudero Katie Escudero
Project Summary: Effort to expand the ESHAP across all grades and schools within TPS by the fall of 2019. The goal of the program is to stabilize families experiencing homelessness and improve the outcomes of students and their families.					
265.Unaccompanied Youth	RA-2017-013		Open		
Project Summary:					
266.Unit Analysis for Occupied Painting	PM-2017-008	Property Management	Future July 31, 2018	2	Barbara Pearsall Barbara Pearsall
Project Summary: Identify units that can fail inspections due to aged interior paint.					
267.United Way Center for Strong Families Site	CS-2018-003	Housing and Supportive Services	Open December 31, 2022	1	Karen Bunce Caroline Cabellon
Project Summary: MOU for a CSF Site at Salishan \$75,000 each year for three years - with a max of up to 5 years.					
268.Utility Responsibility Analysis	PM-2015-002	Property Management	Open December 31, 2017	3	Frankie Johnson Yvonne Ginoulis
Project Summary: This project will assess whether utility responsibilities should be assigned to the tenants in THA's portfolio and the financial impact to THA and tenants					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
269.VAWA Compliance & Policy	PM-2017-023	Housing and Supportive Services	Open June 30, 2019	1	Frankie Johnson Frankie Johnson
Project Summary:	In 2016, HUD issued new rules under the VAWA Program (Violence Against Women Act). These new rules clarified that THA must now notify people whom THA denied admission to its housing programs or evicted or terminated from its housing programs and invite them to seek reinstatement if they were victims of domestic violence. Compliance with these rules entail important details. This project will get it done.				
270.Veteran's Hiring Plan	HR-2014-004	Administration	Future	3	Barbara Tanbara Barbara Tanbara
Project Summary:	The HR department will undertake to explore options for recruiting and hiring veteran's. We will design and implement a plan and work towards a successful program.				
271.Veterans Affairs Supportive Housing (vash)	RA-2017-014		Open		
Project Summary:					
272.Virtual Tour: Creating THA Portfolio Virtual Tour	EX-2021-004	Property Management	Open August 02, 2021	2	Nick Tolley Nick Tolley
Project Summary:	This project will create customized virtual tours of THA's properties and integrate those tours with our new website.				
273.VO Homeownership Program			Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
274. Voter Registration and Voting for THA Clients	CS-2017-033	Housing and Supportive Services	Open April 30, 2021	2	April Black April Black
Project Summary:	This project will greatly increase the number and percentage of THA clients and applicants who, eligible to do so, register to vote and who vote.				
275. Voucher Utilization Rate Improvement	RA-2017-012	Housing and Supportive Services	Open December 31, 2019	1	Julie LaRocque Eric Lane
Project Summary:	THA's utilization rate of its baseline of housing vouchers is a vital measure. THA has been at 100%. That target will be hard to maintain as the rental market tightens and our funding goes down. Competing claims on our funds complicate the question. This project will produce a written analysis and recommendations for the Executive Director.				
276. Washington State Quality Assurance Lite Assessment	EX-2017-005	Administration	Future	2	Michael Mirra Michael Mirra
Project Summary:	THA will apply for a Washington State Quality Lite Assessment THA did this in 2012. See Project EX-2006-1. It will do this again for three reasons. (1) The effort can help THA improve its work. (2) Washington law requires recipients of state funding to apply for these assessments every three years. (3) Doing this makes THA more competitive for funding generally.				
277. Web Site Enhancements: Ongoing	EX-2020-007	Administration	Open June 30, 2021	1	April Black Nick Tolley
Project Summary:	THA is rebuilding its web site. That work is the subject of another project. That new web site will be the platform for other features, such as portals. Listing those features to be built is the purpose of this project. Building those features may require still separate projects.				

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
278. Web Site Rebuild: Proposal & Creation	EX-2018-013	Administration	Open November 04, 2021	1	April Black Nick Tolley
Project Summary:	This project proposes a complete redesign of our Tacomahousing.org website. The redesign would improve accessibility and equity by ensuring the website is viewable on all devices, in all languages, and written at a reading level that all can understand.				
279. Whole Family Services			Open		
Project Summary:					
280. Whole Family Services_1			Open		
Project Summary:					
281. Work Order Follow Up	PM-2018-007	Property Management	Open December 31, 2018	1	Brian McFadden Brian McFadden
Project Summary:	Monthly work order follow up with residents.				
282. Yakima Avenue - Mod Rehab	RA-2017-015		Open		
Project Summary:					

Project Name	Number	Strategic Objective	Status Due Date Closed Date	Priority	Assigning Person Project Manager
283.Yooz AP Automation	FD-2021-001	Administration	Open May 31, 2021	1	Ken Shalik Ken Shalik
Project Summary: Implement AP Automation tool to standardize AP process making it more efficient					

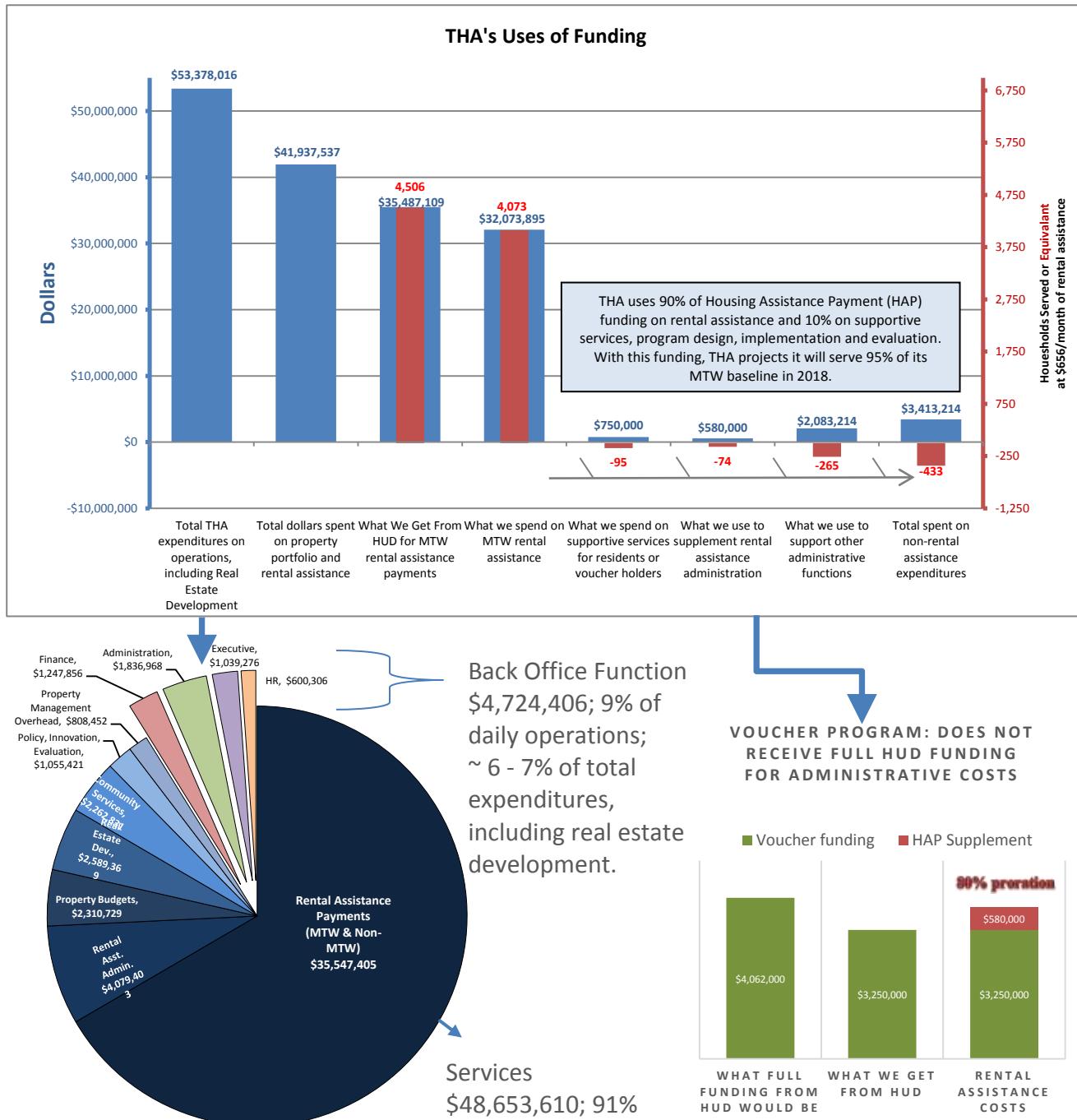


TACOMA HOUSING AUTHORITY

THA USES OF FUNDING

February 7, 2018

This document illustrates the choices THA faces when allocating its housing resources to housing and related purposes.





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Project Management Orientation

Orientation Name	Project Management Orientation
Orientation Text	<p>Welcome to the Tacoma Housing Authority's Project Data Base. We have designed it to be useful for four main purposes. First, it links each project with THA's strategic objectives. This helps keep our work in line with THA's strategic directives. Second, the Data Base is a useful tool for supervisors, project managers, and other project team members to plan and track projects and share information among themselves. Third, the Data Base makes it easy for team members to share information with others in the agency. In this way, it allows your colleagues in other departments to know about your work and for you to know about theirs. This is easy to do since the Data Base is online. Fourth, you can create a wide array of good looking and easy to read reports. These reports are useful to a variety of audiences, including staff, the Board of Commissioners, funders and regulators, the public and media and anyone interested in THA's mission and work.</p> <p>We also designed the Project Data Base to be easy to use. You do not have to know much about data bases. Most of the Data Base's functions are fairly easy to figure out from features or instructions on the screens. Many functions also have additional tips or directions that become visible by passing the cursor over them without clicking. This memo will also guide you.</p> <p>Below you will find information about the following three topics:</p> <ol style="list-style-type: none"> (1) the main parts of the data base and how to use each one effectively; (2) its security features and privilege levels; (3) how to get help if you need it. <p>1. PARTS OF THE DATA BASE</p> <p>The Project Data Base has the following parts described farther below:</p> <ol style="list-style-type: none"> (1) THA's strategic directives: <ul style="list-style-type: none"> ~ vision statement ~ mission statement ~ strategies objectives ~ strategies (2) projects (3) reports (4) miscellaneous features <p>1.1 Vision and Mission Statements, strategic objectives and Strategies</p> <p>The Project Data Base displays the strategic directives that help guide THA's work. The THA Board of Commissioners adopts these. They include: THA's statement of vision, mission statement, strategic objectives, and strategies. The Board also adopts indicators and performance measures. The Data Base Administrator loads them into the Data Base. It is easy for all users to create reports showing this information.</p> <p>1.2 Projects</p> <p>The Project Data Base allows the entry, storage and reporting of information about Projects. This is its main purpose.</p> <p>1.2.1 What type of activity should you enter as a project?</p> <p>It is important to judge whether an activity is appropriate for entry as a project. The following factors should govern that decision:</p> <ul style="list-style-type: none"> ► Would it be useful to enter the activity as a project? The Data Base is first and foremost a tool to make it easier for you to accomplish worthwhile work. If the Data Base will help you accomplish something important, then its entry as a project is more likely to be appropriate. ► Would you like to share the information with others? If so, the Project Data Base would be a way to do that.

- Is the activity of sufficient importance? Do not use the Data Base for activity that is not worth the effort to record, share or report.
- Another factor is whether the activity is something that you would like to appear in a report. Reports are good ways to convey information about projects to a variety of audiences inside THA and among the public. The Data Base, however, also gives you an important option to create a project that you can omit from reports. This is a setting the assigning person can choose from the project detail screen. This can be useful for projects, for example, that would be of interest only among THA staff. Every Department also has a project entered for its miscellaneous activity. E.g., "Community Services: Miscellaneous." This is a place to enter activity that is not important enough for its own project entry.

1.2.2 What type of information can you record about a project?

There are three main types of information the Project Data Base can record about each project. Here they are in order of importance.

(a) Project Detail

The Project Detail screen records basic information about each project:

- *name of project*
- *department*
- *strategic objective*: Each project will be designated with one of the eight strategic objectives that encompass the work of THA:
 - ~ Housing and Real Estate Development
 - ~ Building Communities
 - ~ Property Management
 - ~ Assistance
 - ~ Financially Sustainable Operations
 - ~ Environmental Responsibility
 - ~ Advocacy and Public Education
 - ~ Administration
- *assigning person*: The assigning person, by virtue of that designation, will have full privileges to create or modify project information, including opening and closing a project.
- *project manager*: The project manager is responsible for planning the project and getting it done. He or she often leads a team. By virtue of this designation, the project manager can create and modify the project outline, which is the plan for getting it done.
- *status*: Each project is “open,” “closed,” or “future.”
- *due date*: This is the date the project is due to be completed. There is also a way to list a project as “ongoing.” This would be appropriate for those projects that last indefinitely.
- *project summary*: This is a short narrative describing the project. This description will appear in reports listing the project. It should be concise, clear and well written.
- *full project description*: This is a longer narrative describing the project and its goals. It serves as an opening memo for the project. You can amend it at any time. This memo, with a final editing that also describes how the project turned out, also serves as a closing memo when the project ends.
- *strategies*: The assigning person must link the project to those agency strategies that the project supports. If you cannot find a strategy that the project directly supports then you should consider whether the project is worth doing.
- *performance measures*: This is a place to list those indicators that you will use to determine whether the project is on course and, at its conclusion, whether it was a success or not. This should be a short list. In fact, the field limits you to 90 words. This limitation makes it suitable for including in reports.
- *include in printed reports?*: The assigning person can set this to "NO" and by doing so omit the project from all printed reports. 'YES' is the default setting.
- *results*: This is a place to report on how the project did as measured by the performance measures. Again, this field is limited to 90 words to make it suitable for including in reports. The results

screen also asks you to assign a numerical grade to indicate the degree of success. Further details on how the project turned out can go into the full project description, which you can amend when you close the project.

(b) Project Outline

The project outline allows a project manager to break a project into its objectives and tasks, and to assign each to a team member (or to him or herself), with due dates. The Project Data Base also allows assignments to people outside THA. In these ways, the project outline is the basic plan for the project. Writing it serves several purposes:

- The effort to write a project outline at a minimum obliges a project manager to pause, think and plan. Entering a project outline may seem time consuming and may slow you down. This is part of its value. Planning takes time. Writing and entering a plan can be clarifying. So please be patient with it.
- The project outline requires the project manager to break a project down into its constituent objectives or tasks. The project manager or team members can further break down an individual objective or task into its own constituent subobjectives or subtasks.
- The project outline is also a way to give direction to a team. It makes assignments, sets due dates and states expectations.
- Used in these ways, the outline serves as a useful agenda for project team meetings.
- Because it is on line, the project outline lets others track the project's progress.

The level of detail for the project outline probably should depend on at least the following factors:

- the complexity of the project;
- what the project manager finds useful to list;
- the level of detail each assigning person needs with a particular Project or a project manager to have adequate assurance that there is a plan and that it appears in enough detail to allow him or her to track its progress;
- the level of confidence an assigning person or a project manager has that the Project will get done correctly and on time.

Project managers should expect to continually adjust this Outline to account for changes in plans, schedules and the understanding of the Project.

(c) Project logs

The Project Data Base allows chronological entries about each project as a whole, or about individual objectives or tasks. These are called "logs". Logs are diary entries. They record events or developments. This would be particularly useful for those projects that require a forensic record or a detailed account, such as collective bargaining or construction management. Logs are also a way to inform the project team of conversations or events. The Project Data Base can store logs and generate a report of logs in a number of ways. It can store and report logs associated with the whole project or with discrete tasks of objectives or groups of tasks or objectives or in combination.

1.2.3 How to plan a project

The types of information you can record about a project (listed above) suggest a way to plan one. Here are the elemental steps for planning a project, using this Project Data Base.

STEP ONE - PROJECT GOALS: You should first have a clear idea of the project's purpose. You should state the purpose clearly in the project summary. Your full project description, which provides more room, should describe the purpose in more detail. The effort to write these down in the Data Base can be clarifying.

STEP TWO - PERFORMANCE MEASURES: You must enter performance measures for each project you create. These will help the project team stay on course and allow the team and others to determine if the project is a success or not, and to what extent. You should refer to these as you plan and do the project. Because performance measures are so important the Project Data Base requires you to enter them in order to create a project.

STEP THREE - PROJECT OUTLINE: The Project Outline is the place to plan the project. The outline

breaks a project into its elements. A Project Outline is well done if it (i) sets out those steps that, if completed, will achieve the goals of the project and produce the performance measures you seek; (ii) does not include unnecessary steps. For this reason, you should consult those goals and performance measures set out in the project detail as you write the Project Outline. You should expect to continually adjust this outline to account for changes in plans, schedules and your understanding of the project.

The Project Data Base offers some templates for outlines. You choose them from the bottom of the screen you use to create or edit a project. These templates are useful for projects that repeat each year or that closely resemble others. In these cases, you do not have to build an outline from scratch. The Data Base Administrators are responsible for creating templates.

STEP FOUR - ASSESSING RESULTS: When you close a project, you should update the Full Project Description. It will serve as a closing memorandum. Also, the Data Base requires you to enter results into order to close a project. The results should be a short account of how the project did as measured by the performance measures you initially entered. As part of the results, you must also enter a numerical grade.

1.3 Display of Data and Reports

With all the information loaded into the Project Data Base, you can then ask the Data Base questions and display the answers in a variety of ways and produce a variety of printed reports. The array of displays and reports include:

- ▶ vision and mission statements, strategic objectives, and strategies, with or without supporting projects
- ▶ projects by department
- ▶ projects by assigning person
- ▶ projects by project manager
- ▶ projects by strategic objective
- ▶ projects, objectives and tasks for individual team members, including a report of those that are past due.

In most of data displays and reports, you can further select the content by status, date and other attributes. You can design reports with varying levels of detail. You can control how the information is sorted. All reports can be printed out directly. You can also turn them into a PDF Document. You can also export data to an EXCEL file.

You can also see and print a list of changes to some project information made since December 3, 2007:

- ▶ *project manager and project due date:* You can see changes to this information by mousing over the due date field in the project detail screen. Double click on that field to see and print a report of the changes.
- ▶ *project item due date:* Mouse over the deadline field for an item on the Project Outline to see the history of changes to the project due date. Double click on that field for a report you can print.

1.4 Some Other Useful Features

- ▶ *email notices of changes:* The program will generate an email when someone makes certain changes to the project information. The purpose of the email is to alert people on the project team about the change. The person making the change can edit the email and change its recipients, or decide not to send it. Here are the changes that will generate an email and the people who are set to receive it.

Change	Recipient of Email
Creation of new project	Project Manager
Entry or Change of Performance Measures	Project Assignment Person Project Manager All persons with item assignments
Creation, change or Deletion of Item	Person assigned to item Person removed as item assignee Person assigned to "parent" item Person assigned to "children" of item Project Manager
Log entry	Person assigned to item

Person assigned to "parent" item

Person assigned to "children" of item

Project Manager

NOTE: Project logs go to assigning person, project manager and all persons with item assignments.

Closing of item

Person assigned to item

Person assigned to "parent" item

Person assigned to "children" of item

Project Manager

Project Assigning Person

Closing of project

Project Manager

All persons with item assignments

The text of the email is also recorded as a log linked either to the item it pertains to or as a project-log linked to the entire project.

- ▶ *creating project binders:* The project detail screen allows the easy creation of binder covers and binder spine labels for project binders. This helps keep agency binders looking uniform and neat.
- ▶ *project contacts:* The project detail screen allows the storage of contact information for persons associated with a project. These contacts, however, are not linked to Microsoft Outlook.
- ▶ *bugs and suggestions:* There is a way for you to send the administrators of the Data Base your reports of problems, bugs or suggestions on how to improve it.

2. SECURITY AND PRIVILEGE LEVELS

Not everyone at THA has access to do everything in the Project Data Base. Three factors determine access. **First**, not everyone in the agency has the Filemaker software needed to open the Data Base. The department directors determine who in the department has this. **Second**, the Information Technology Manager sets the privilege levels for those with access to the Data Base. He or she will do this at the direction of the department directors. **Third**, the Data Base itself assigns privilege levels to the information within each project depending on who is set as the assigning person, project manager or team member. Here is some more detail about each level of access.

2.1 Access to the Data Base.

To use the Data Base, you need FileMaker installed on your computer. Not everyone in the agency has this. The department directors determine who in the department should have access to the Data Base. If you would like access, speak to your supervisor.

2.2 Privilege Sets

The Data Base has four main designations of privilege levels among those with access to it. They appear below with some information about each. If you try to do something in the Data Base that is beyond your privilege level, the Data Base will not allow it and will usually show you a polite message explaining why. THA's Information Technology Manager assigns all people with access to the Data Base to one of the following four privilege levels. The Data Base will know your privilege level when you log in, identify yourself from the pull down list and enter your password:

- ▶ *administrators:* There are four Administrators:
 - IT manager
 - Executive Director
 - Executive Administrator
 - Data Base Programmer

The Administrators can add, modify or delete any content in the Data Base. They can also change its structure or functions. In particular, they enter the vision statement, mission statement, strategic objectives, and strategies. They also create, edit or delete templates for Project Outlines.

- ▶ *managers:* All department directors are managers in the Data Base. Anyone else they ask the IT manager to designate as a manager will also be one. Those will usually be the staff that report directly to them. Managers can create projects. They can be the assigning person for a project. They can be a project manager. They can also be team members of other person's projects and be assigned an objective or task. They can view most

information in the Data Base. However, they cannot enter the vision or mission statements, strategic objectives, or strategies. They cannot change the lists of departments or types of project status. They cannot add or change a template. They cannot change the structure or function of the Data Base.

- ▶ *users*: Users are those other staff to whom department directors direct the IT manager to give access to the Data Base. Their access is the same as managers except they cannot create a project.
- ▶ *read only*: Yet additional staff will have access to the Project Data Base only for the purpose of viewing data displays. They cannot print out reports.

2.3 Project Level Access

Further levels of access arise from designations within each project:

- ▶ *assigning person*: The assigning person can create or modify any information in the project Record.
- ▶ *project manager*: The project manager can create or modify the Project Outline and make assignments pursuant to it. This is the project manager's main responsibility. The project manager **cannot** modify the following information about the project Detail:
 - project name
 - department
 - strategic objective
 - status
 - project summary description
 - full project description [NOTE: The program does allow the assigning person to give or withdraw the project manager's ability to edit the full project description. This button is on the full project description page in modify mode.]
 - strategies
 - assigning person
 - project manager
 - project due date
 - performance measures and results [NOTE: The program does allow the assigning persons to give or withdraw the project manager's ability to modify these. This button is on the Project Detail page when creating or modifying a project.]
- ▶ *team member*: Anyone assigned an objective or task in a project cannot change that assignment, its description or due date. However, they have full control to add and modify objectives or tasks subordinate to their assignment.
- ▶ *department director*: Each project is assigned to a department. The director of a department to which a project is assigned has the same privileges for that project's data as the assigning person would have even if the Director is not the assigning person, the project manager or a team member, with one exception. If the executive director is the assigning person, the department director has the same privileges as only a project manager.

The purpose of these limitations is to preserve, to the extent of the limitations, the assigning person's project control.

3. HOW TO GET HELP USING THE DATA BASE

There are several ways to get help or advice about using the Project Data Base:

- ▶ *the screen*: If you are stuck, take a closer look at the screen. Many screens have written instructions or explanations. The placement or labeling of the features and buttons may also be helpful. Some features or buttons will reveal more information if you pass the cursor over them, without clicking. If so, short advice or instruction will appear briefly on the screen before fading away. To see it again, pass your cursor again.
- ▶ *desk top support*: The following people at THA should helpful:
 - Administrators (IT manager, E.D., Executive Administrator)
 - your department director
- ▶ *bugs and suggestions*: The Data Base has a place to report problems or make suggestions. The IT manager and the Data Base designer will read it and respond to you.

We hope you find the Data Base useful. Your comments and suggestions would be nice to hear. Nice or not, send them to the IT manager.

Owner	eightCloud	Last Modified By	eightCloud, 2/5/2016 10:22 AM
Created By	eightCloud, 2/5/2016 10:21 AM		

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11/20/2018

Tacoma Housing Authority

Dear Office Staff,

We would like to express our sincere deepest appreciation for your continued support in our housing payments.

The first two years we arrived in US, we had to spend almost all of our income to pay for rental. But we have been very fortunate to be selected by your Section 8 office to receive this huge support in our renting payment difficulty.

But later, your office had offered us even more. We got an opportunity to buy the house with your amazing support in mortgage payments.

Thanks to you, I, as a head holder of my family, was able to spend more time in college to improve my English and skills.

We would like to say special thanks to Maria Yakimenko. Maria had saved our contacts and reached out to us when your office had opened the Section 8 program. She gave us many advices on how to do everything correctly to be successful in our country.

Also, we would like to Alice Kimbowa who worked in your office. Alice and Maria directed my family to try the better opportunity to buy a house with your office support. We believe this is one of our greatest blessings in our life for our big family.

Please accept our sincerest thanks and gratitude. We wish all blessings to all who is working in this office.

We wish blessings to you and your families. May all of you have nice and peaceful homes and everything good in it.

God Bless You and America

Have a blessed and happy Thanksgiving

Sincerely,

S ██████████ Family

Michael Mirra

From: Michael Mirra
Sent: Tuesday, June 11, 2019 1:50 PM
To: Michael Mirra
Subject: FW: Thank you

From: [REDACTED]
Sent: Wednesday, September 26, 2018 11:40 AM
To: Amber Prentice <aprentice@tacomahousing.org>
Subject: Thank you

I'm writing this email because I wanted to let you all know how important this college housing assistance program was for me personally. I started going back to school when I was 25 and there were a lot of obstacles along the way including me breaking my leg and having multiple surgeries which in some cases cause me to have to leave school for a while. In addition to that I'm a single mom and I had twins at age 20. But I kept moving forward. I was able to work full-time while I was taking my prerequisites because they were online classes. I had another child right in the middle of my last prerequisite class. Once I finally got into TCC nursing program I was no longer able to work full time due to the demands of the program. I still had to work and found myself single again with very little help or support. I cleaned houses, did in home care for the elderly, and worked as a process server in my spare time from school but was not making enough to live on. I became homeless during the program and had to live in one bedroom at my mom's with 6 other people.. with all three of my kids ages 12,12 and 4. This was an extremely difficult time emotionally and financially trying to fulfill my obligations to the program, save money and care for my kids alone. I thought it would break me. This program was a godsend... being able to have my own little safe space without other people invading my space or interfering. I was able to successfully finish the Registered Nurse program at TCC and I am scheduled to take my state boards for my nursing license. I will soon be making enough money to support my family. I don't know if I'd have gotten through all of that without a little help, and now I get to have a fulfilling career caring for others and rest easy knowing my own family will be stable. Thank you so much for this opportunity. I'll be starting my bachelor's degree program in nursing next year and have goals even beyond that because of a renewed confidence in myself for finishing this extremely challenging RN program. Please keep doing what you're doing, there are others out there like me.

[REDACTED]
Graduate Registered Nurse

From: [Michael Mirra](#)
To: [Michael Mirra](#)
Subject: FW: J "My Story"
Date: Friday, July 19, 2019 2:39:20 PM

-----Original Message-----

From: J [REDACTED] <[j\[REDACTED\]@gmail.com](mailto:j[REDACTED]@gmail.com)>
Sent: Wednesday, June 26, 2019 11:41 PM
To: Byron Williams <bwilliams@tacomahousing.org>
Subject: J [REDACTED] "My Story"

Hello,

Since I have been able to join the Housing Program my life has changed. When I was accepted. I was currently homeless and staying in a shelter with three children. Really just trying to get back on my feet. Since we have been able to get a home. Our whole life completely changes. From us struggling to now being able to provide children with some stability. Their Academics started to get a lot better. My oldest daughter went from reading at 1st grade level for reading, to 5 grade. She also got a Most Improved award this year. To walking out of the 5th grade feeling confident and believing in her self again. My middle daughter went from not know willing or wanting to learn. Not knowing how to do adding and subtracting, to being able to do it now. To be excited bout learning, I am blessing that I received Housing alone!! Along the way got meet some petty nice people. Every case worker I have ever had, as been nothing but understanding and helpful. This program is very helpful, in more ways then one! Financially I am able to do so much more. Being able to pay rent, cable, lights, cell phone, and everything else, with no worries. Is the best feeling in the world, which now I am able to follow my own dreams. Currently a full time student, going for my ECE(Early Childhood Education). Hopefully in two years ill be able to have my own daycare center. Work full time at a daycare center, i love it. Came to see that children are my passion.

Thank you sooooo mcuh

J [REDACTED]

Sent from my iPhone

12/22/2011

We would like to express our sincere thanks to the CS Department of THA, its director Nancy Vignec, the program Manager Mary Syslo Seel, the executive director Michael Mira, and all THA staff for their important work of helping those in need by providing them with one of the basic human necessities – a shelter, and helping them overcome obstacles on their way to economic independence.

Looking back at our life in America, we are amazed by the hospitality that we have encountered here and the support that has been offered to us. We hadn't even dreamed about getting college education and finding a good job in America, but this became a reality.

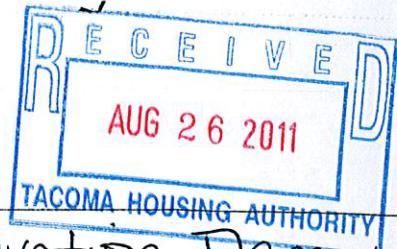
We came to the United States in December of 2000, and in September of 2001 we already had housing, which would not have been possible without the help of the Section 8 program. The rent assistance offered by THA gave us an opportunity to learn English, earn a professional AA degree at TCC, and find a job after graduation. We also enrolled in the Self-Sufficiency Program, which helped us become financially literate and saved money for us, enabling us to start the home-buying process.

Now, when we are about to complete this last step on the way to our self-sufficiency, we would like to express our cordial gratitude to the Tacoma Housing Authority for making all this possible and for helping us get a good education as well as achieve success and stability.

We would also like to thank the case manager and translator, Maria Yakimenko, for walking us through the steps of the self-sufficiency program and supporting us on the way to the achievement of our goals.

Sincerely,

[REDACTED] [REDACTED] and family



To Tacoma Housing Authority | Salvation Army

I needed to say thank you to THA and FSS & S.A. for helping to transform mine and my kids lives. I wanted to say thanks to Sharon Fletcher and Markita Marks. I wanted to say to the case managers not to give up on your clients. I am living for the first time in my life. My name is Kellie and I am 42 yrs old. I have 3 kids 20, 12, 8 this year. I spent the last 40 yrs of my life existing from a background of sexual abuse, physical abuse, mental abuse and domestic violence. I existed on Section 8 with no hope of a future. I attempted for 20 years to complete my Nursing degree. Never able as I would make too much as a licensed Nurse. But didn't make enough to make it without housing. I was on the FSS program and had an escrow account. My dream was to go back to [redacted] (where I grew up and finish University). I moved back in 2008 with a plan and case managers who believed in me. Without the FSS funds I would never have got off housing and my life wouldn't of changed. Well this is what the Lord has done for me and my family.

I graduated with my Bachelor's of Nursing and currently work in the Intensive Care Unit as a Registered Nurse. I am half way to finish my Masters in Nursing hoping to be a Nurse Practitioner.

I am the 1st person in my family to go to university.

my daughter [REDACTED] will graduate from high School in November and starts University in January with a Bachelor Degree in Ec Sloan Marine Biology.

[REDACTED] is in grade 7 and her Autism has improved 75%. [REDACTED] is in grade 2 doing fantastic. Both attend a private school.

For the 1st time in my childrens life I am self sufficient. I have money for food, clothes, and we live 2 houses from the beach.

I am so happy. I am living for the first time in my life. I have a job, peace and excitement about my life and the future for my kids. The opportunity I had, the support I had, the drive to make my life better and it really happened. Who would of thought this would be my life and I would have a holiday and come visit.

Never stop believing in your clients But also challenge them Housing is not meant to Be a right or a life Style It is a gift, a tool, A means to make the change Thank you THA for helping me to become a great mother, Nurse and person In closing I Need to Share these words from a song called The living Proof from the movie "THE HELP"

It's going to be a long long journey, it's going to Be an uphill climb; It's going to Be a tough fight, It's going to Be some lonely nights

But I'm ready to carry on. I'm so glad the worst is over, I can start living now. I feel like I can do anything, and finally I'm not afraid to breath. Anything you say Chorus: to me and everything you do, you can't deny the truth . . . cause I'm the living proof. So many don't survive, they just don't make it thru . . . but look at me I'm the living proof . . . Oh yes I am.

Thinking back lifes been painful . yes it was.
TOOK a while to learn how to smile

So now I'm going to talk to my people
about the storm... about the storm.

So glad the worst is over I can start flying
now.

my best days are right in front of me,
and I'm almost there cause now I'm
FREE.

Chorus:

I know where I'm going cause I know
where I've been.

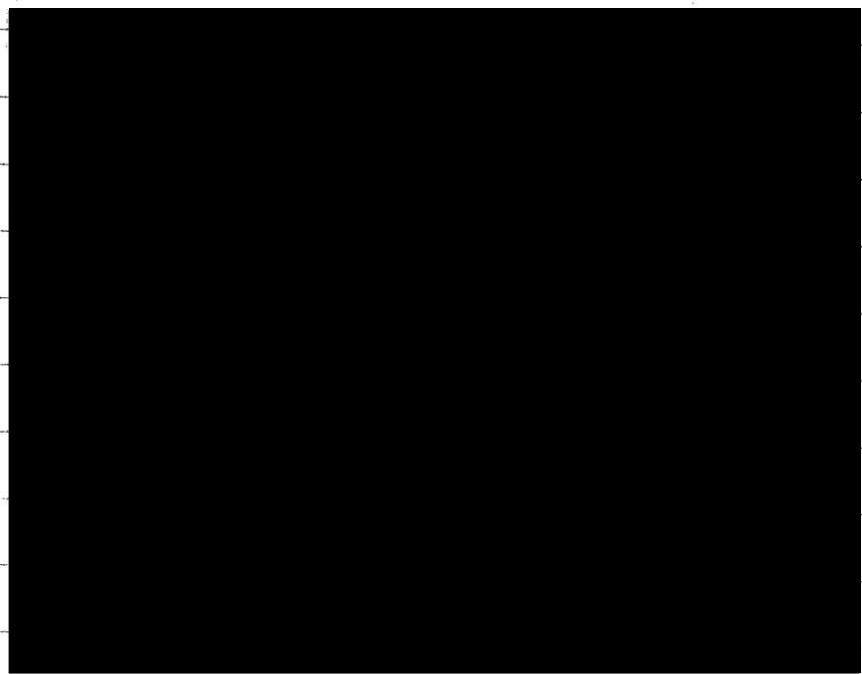
I got a few scars that are showing. I'll
stay strong, keep going on.
That's the way I win.

Chorus:

Nothing about my life's been easy - NO -
But nothing is going to keep me down
cause I know a lot more today than I
knew yesterday.

So I'm ready to carry on. Oh Lord yeah.

God has guided me, directed me and my
life has been radically changed. Thanks
Again Sharon and THA and Salvation Army
Shelter.



Feel free to check us out on
FACEBOOK



(pink hope)



Sept 2, 2020

HELLO, Tacoma Housing Authority

Fr. R. [REDACTED] (Tenant)

I am writing you a short

Thank you. Fr. Her, Fr. [REDACTED] has such a wonderful team who has compassion and understanding for their clients and community. Bless.

NOTE TO
THA FROM a
tenant.
Nov. 13, 2018

To Whomever is lucky enough
to get this...

I think this is a little bit late. I'm hoping its not too too late. I'd like to thank you and the program for being so nice all these years. I consider myself very lucky to have the support of the

program and all you smart nice folks that have helped me so much. Most all of you have helped me in some way or another and it's always been "pretty painless" I know I've been trying on you all's patience a time or 2 and you (everyone) was really nice about it, and I didn't feel like I was the dreaded client that everyone would like to pass on to their neighbor.

THANK YOU PAULA Your #1 FAN!

WRITTEN ON
OUTSIDE OF THE
envelope



P.S.
Just thought you might like to know you make a difference in my(our) lives.

P.S.
You HAVE HELPED
TO MAKE MY life...
well less Painful and
I always pick your
bandages... your people
have a way of helping us
to get those bandages
off quickly and pointed
in the "Positive" direction

THANKS

AUG 20 2018

Dear Tacoma Housing Authority

Tacoma Housing Authority
902 South L Street
Tacoma, WA 98405
www.tacomahousing.org

this I am writing to thank you for helping me and my children years ago by providing place to live.

See when I came to worker Lesley (the social I had just left an abusive marriage and I had no options.

I feel will never forget the most first day of the one of the best days I had my life. I never had the opportunity

I'd like to thank you and all the social workers who helped me during those years I lived there.

I was suffering from PTSD, anxiety, depression and led to some of the problems. Because of the services you provide my children always had a safe, cozy, loving home to be a family.

I have been able to overcome my problems by the grace of God. I finished my education in Tahoma while living and have served as

a Public School
Teacher for 11 years
now. I would not
have been able to
accomplish self
sufficiency if it
weren't for the help
& relief you provided.

I want you to know
of the work you
do. It saves lives &
protects children.
I'm sure that more
than you hear "Thank you"
for all the
hard work
for clients. If you do
it with a truly kind, caring
compassion, it's easier
to do your job.

Thank you for

with compassion,
patience, and love.

To the people who work
for Tacoma Housing
my family saved
my life & my
children as well.

I cannot thank you
enough for giving me
the gift of autonomy.

Parly B



RECEIVED
TACOMA HOUSING AUTHORITY

AUG 20 2018

Head of Household:

Phone #:

L&O:

August 17, 2016

To whom it may concern:

My Name is J [REDACTED] and I live at EB Wilson unit [REDACTED] I want to Thank Tacoma Housing Authority Relocation Team and Walsh Construction for all the hard work and time that they have put into making the repair and upgrades to my unit and to EB Wilson building I just cannot say enough on how beautiful everything is turning out.

The windows are more sound proof, the heaters are very nice and they heat up very quickly, it is nice that the heater are up and out of the way and I am able to have more room so that I can utilize the space to place my furniture in front of the windows now without starting a fire in the unit.

The lighting is much brighter and I like it very much because I do suffer from depression, and the bright lights really help me on the days when it is dark and cloudy.

I now have a brand new stove and refrigerate wow!!! I love it very much, thank you.

I also, would like to say the old counters tops were worn when I moved out for my relocation. I like that the counter was resurfaced (wrap) so now I have a new counters (awesome).

Again thank you very much Tacoma Housing Authority, Walsh Construction and Relocation Team for all that has been done for me and the other Residents here at EB Wilson.

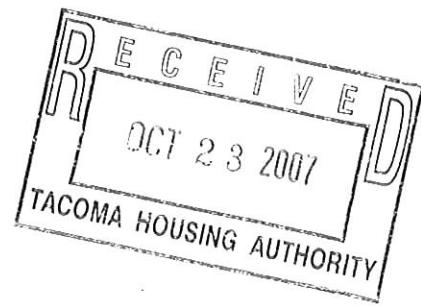
Sincerely,



J [REDACTED]
EB Wilson
1202 South M Street Unit [REDACTED]
Tacoma WA 98405

October 19, 2007

Mr. Michael Mirra
Executive Director
Tacoma Housing Authority



Dear Mr. Mirra:

I wanted to take a few minutes to share with you an experience that my brother (Clarence [REDACTED] – client) and I had today at the Rental Assistance Division on L Street. We were scheduled for an informal hearing regarding his eligibility. When we arrived, we were graciously and cheerfully greeted by the front desk staff. In fact, all individuals who came in around the same time we did were greeted the same way. As we waited to be called to be seen by a specialist, I noted that any staff member who walked through the lobby and made eye contact with anyone sitting in the waiting area, said a hello or nodded and asked "how are you today?" As individuals were called by their interviewer, they were addressed by title and last name – no overly familiar, first name basis. When the individual responded, the interviewer said a friendly hello, come with me. I felt this was a sign of the utmost respect which a number of "needy, low income, disabled, or senior" individuals do not often receive. I was impressed and beginning to think that maybe this experience with my brother was not going to be too "bad" after all.

We were then called – 15 minutes ahead of our appointment time – by specialist Ms. Vernetta Johnson who greeted us with a smile and was patient as both of us with limited mobility followed her to her office. During our interview Ms. Johnson was again patient as we completed paperwork; and most importantly, explained the recertification process to us in a non-robotic manner. As she escorted us from her office, we did not feel that we were being dismissed but that we had concluded our business.

All in all the entire experience was very pleasant and not as adversarial as I had anticipated. Thank you for a professional, respectful, caring staff.

Respectfully,

Marilyn [REDACTED]

Marilyn [REDACTED]

Tacoma, WA 98404
(253) [REDACTED]

Cc: THA Board Commissioners
HARD COPY TO FOLLOW

December, 11/19.

My Family a I, were supported in rental rent by THA for a period of four and a half years. During this time, it is our duty to thank everyone who has assisted us in one way or another; in time and against time.

First, we express our gratitude to all the competent authorities (~~Expert~~ Housing Expert) of THA who had accepted our request among millions and millions of applicants. Through them, we also salute the morale assistance of the staff who were with us.

Second, our gratitude to Mrs Sharon Jackson, our Case Manager. Like all mother, this lady has not stopped giving us advice ~~and~~ and directions for the development of our family. It is worth remembering here, it was thanks to her that we were hired to CTC (Concrete Technology Corporation). We say again, thank you mom.

To close these words, we will be ungrateful if we do not say a word to the place of Madeline & Julie, both, Financial Advisor. It is thanks to their expertise that we have received financial recognition. We also say thank you.

To all that are not mentioned here, and are forgotten by megarde, we are grateful to all.

For the family,

RECEIVED

AUG 20 2018

Dear Tacoma Housing,

I am writing this letter to thank you for helping me years ago by providing place to live.

Tacoma Housing Authority
902 South L Street
Tacoma, WA 98405
www.tacomahousing.org

When I came to see Lesley (the social worker) what helped me I had just left an abusive marriage and had no options.

I feel very grateful the moment I got the keys to my new home. It was one of the best days of my life. I never had the opportunity to have a warm, nice

②

I thank you and
all the social workers
who helped me
during the years I
lived there. Years I
was suffering from
PTSD, anxiety & from
depression, anxiety & from
led to some and
Because of the services
you provide the services
children had my I
always had a safe
to be living home,
safe a family.
been here since
my problems to overcome
since I finished my by the
is began the education
and I began while living
have served as

(3)

a Public School Teacher for 11 years now. I would not have been able to accomplish self sufficiency if it were not for the help & belief you provided!

What wasn't you to know or serves you
protects children. I'm sure that more often than not you hear "Thank you"
for hard work for all the clients. If you do
to do your job. person

Thank you for
always treating me

(4)

with compassion,
patience, and love.

To the people who work
for Tacoma Housing
my truly saved
child & my
children as well.

I cannot thank you
enough for giving me
the gift of autonomy.

D [REDACTED] B [REDACTED]

RECEIVED
TACOMA HOUSING AUTHORITY

AUG 20 2018

Head of Household:

Phone #:

L&O:

Sept 2, 2020

HELLO, Tacoma Housing Authority

Fr. R. [REDACTED] (Tenant)

I am writing you a short

Thank you. Fr. Her, Fr. [REDACTED] has such a wonderful team who has compassion and understanding for their clients and community. Bless.

From: [REDACTED] his8thwonder@gmail.com >
Sent: Sunday, September 06, 2020 2:20 PM
To: Dana Duncan <dduncan@tacomahousing.org>
Subject: Please forward on to Michael M and the big Boss's.

Dear Tacoma Housing Authority,

I am a client and Dana Duncan is my gal there. She is a keeper for sure.. I want to take this time to thank you from my heart for the wonderful safe white masks you sent to me in the mail. I just cried when I opened your envelope.. Something so simple as a mask means so much to us elders in so many ways. I have a pre-existing health issue and the Covid -19 scares me so much. I see people on TV not wearing a mask and I think to myself . How selfish they are. I only go to Safeway and back. My Dr. from the Puyallup Tribe sends all medications by Fed-X. I am so Blessed . You're all so kind and full of Compassion and I needed these so bad.. Again thank you and as I smudge today I will keep the entire staff my, { ANGEL"S } at Tacoma Housing Authority in deep prayer... God Bless each and everyone of you.. Mask up and Stay Safe..

Much Respect and Appreciation,

S [REDACTED]

Speak up for your community and yourself by participating in the 2020 census. Learn more and get started at 2020census.gov.

Speak up for your community and yourself by participating in the 2020 census. Learn more and get started at 2020census.gov.

From: [Tom Mathews](#)
To: [Michael Mirra](#)
Subject: RE: Touching Gesture
Date: Monday, March 6, 2017 9:46:22 AM
Attachments: [image002.png](#)
[image003.png](#)

Michael..... Thank you for sharing this heartwarming occurrence. It is so gratifying to hear about acts of kindness from any corner.. Today, it is especially meaningful. I have known few people who are more eloquent or compassionate than you when sharing an event or complimenting someone(s). The folks involved, THA and Walsh, will feel great pride when they read your kind words, and they will.

Your acknowledgement will make the day for a lot of good people. It certainly did mine. I hope to see you sometime in the not too distant future. BTW, we will soon send another donation to your Children's Scholarship Fund. Hope I have that name right. Until we meet, best regards.

Tom Mathews | Board Member

Walsh Construction Co.

Seattle, WA | Tacoma, WA | Portland, OR

315 Fifth Avenue S, Suite 600 | Seattle, WA 98104
Main: (206) 547.4008; Cell: (206) 551-6588

From: Michael Mirra [mailto:MMirra@tacomahousing.org]

Sent: Saturday, March 4, 2017 9:39 PM

To: THA All <THAAll@tacomahousing.org>; Bob Walsh <bwalsh@walshconstruction.com>; Bill Reid <breid@walshconstruction.com>; Tom Mathews <tmathews@walshconstruction.com>; Ron Ward <RWard@walshconstruction.com>; Mihn-Ahn Hodge <mhodge@tacoma.k12.wa.us>; Derek Young <Derek@IDreamRobots.com>; Dr Arthur Banks <drart6651@aol.com>; Janis Flauding <janisflauding@hotmail.com>; Stanley Rumbaugh <sjrumbaugh@aol.com>

Subject: FW: Touching Gesture

Dear THA Commissioners, Staff, and Bob, Bill, Tom and Ron of Walsh:

I append an email string describing a “meaningful act of kindness” by our wonderful THA staff and the wonderful staff of Walsh Construction and its subcontractors. We are indeed fortunate to share this hard work with people who give it such meaning. It reminds me of what the writer Studs Terkel wrote about work: Work is a search not only for “daily bread but daily meaning, for recognition as well as cash, for astonishment rather than torpor; in short, for a sort of life rather than a Monday through Friday sort of dying.” The world is filled with people who hate their jobs, who cannot see or feel that their work has meaning, or who work for organizations that do not add evident value to

the world or care enough about their employees. Then there are organizations and companies like THA and Walsh, and people like their staff. You are all inspiring.

Thank you for what you do, for doing it so well and for why you do it.
Thank you very much.

Michael

Michael Mirra

Executive Director
Tacoma Housing Authority
902 South L Street, Tacoma, WA 98405
(253) 207-4429
mmirra@tacomahousing.org
www.tacomahousing.org



"Housing Tacoma Forward"

From: Karen Peterson
Sent: Thursday, March 02, 2017 10:47 AM
To: Michael Mirra
Subject: FW: Touching Gesture

Michael:

I want to share the following with you. We are so fortunate to be working with staff and partners that have this degree of compassion.

Karen

From: David Palomino
Sent: Thursday, March 02, 2017 10:01 AM
To: Harvey Adams
Subject: Good report

Harvey,

I wanted to share a few details about a positive occurrence here at K street.
On February 21 a Walsh worker by the name of Finn Jensen came to my office and reported

that the unit they began working in had a concern that he would like to help with. Unit 112 at K street belonging to Mary Johnson was tidy and well prepared for the work. All her items were packed and ready for weeks in advance in much anticipation for the RAD project coming through. However, Mr. Jensen reported that the bed in the unit was broken and the mattress had a huge crater in the middle of the bed. Mr. Jensen was deeply troubled that this resident was using a bed in this condition. Finn asked if there would be any problem starting a collection to purchase a new bed for Mary Johnson.

I told him I did not see an issue other than making sure that we make sure that this is what Mary wants when she returns.

Mary had been relocated to a hotel while the work was being completed in her unit on February 19 and would return on February 24. Mr. Jensen began a collection to purchase a new bed for Ms. Johnson and received funds for the next couple of days.

Nearly everyone on site participated in donating to this fund. Several Walsh employees, members from the various trades on site, and THA staff all participated. One plumber in particular donated \$100 upon presentation of the endeavor.

Mr. Jensen went to Mattress Ranch on February 21 and purchased a new bed for \$232.47 with the funds that were raised that day.

New carpet was installed in unit 112 on February 22 and the new bed was set up February 23. We retained Mary's old bed in the event that she might be unhappy with a new bed and would want her old one back.

Mary Johnson returned to the K street apartments on February 24. I was able to meet her at the door and let her know we had a surprise for her and hoped that she would like it. I escorted Mary to her unit and presented the new bed that was purchased for her. Her immediate response was "thank you Jesus". She was very pleased with her new bed and we were all relieved that we didn't overstep our bounds. Irma Chism (THA relo specialist) made her new bed up with new sheets and a new pillow as well as bringing in Mary's blankets and pillows from her old bed.

I saw Mary again on February 27 and asked how she was enjoying her new bed. Mary replied that it was very comfortable and she was getting good rest.

I would like to commend Mr. Finn Jensen, the Walsh staff here at K street, the subcontractors who participated, Irma Chism (THA relo specialist) and everyone who took part in this small but meaningful act of kindness.

It is my pleasure to report that I am surrounded by individuals who are able to see the needs of others and have the initiative to take action.

Sincerely,

David Palomino
Construction Site Manager
902 South L Street
Tacoma, WA 98405
Cell: 253 341 2655
dpalomino@tacomahousing.org



TACOMA HOUSING AUTHORITY

**ADMINISTRATION
REPORTS**



TACOMA HOUSING AUTHORITY

FINANCE



TACOMA HOUSING AUTHORITY

Motion

Adopt a consent motion ratifying the payment of cash disbursements totaling \$6,173,886 for the month of May 2021.

Approved: June 23, 2021

Stanley Rumbaugh, Chair

TACOMA HOUSING AUTHORITY
Cash Disbursements for the month of May 2021

		Check Numbers	From	To	Amount	Totals
A/P Checking Accounts						
Accounts Payable Checks		Check #'s	94,905	-	94,948	
Accounts Payable ACHs		ACHs	603	-	650	
Business Support Center					639,700	
Moving To Work Support Center					120,884	
Moving To Work Buildings (used by Support Center)					155,808	Program Support
Tax Credit Program Support Center					26,111	
Section 8 Programs					321,579	Section 8 Operations
Alberta J Canada Bldg					299	
Hillsdale Heights					44	
Outrigger					10	Properties
Salishan 7					15,725	
THDG - General					33	THDG
Bus Development Activity					52,078	Development
CS General Business Activities					7,395	
CSA Program - Business Activities					2,346	
Department of Commerce Funding for Crisis Residential Center					122,738	
Community Services MTW Fund					10,878	Client Support
Education Private Grants (Gates, etc.)					15,042	
COT-Community Wellness Program					49	
AMP 6 - Scattered Sites					10	
AMP 9 - HT 1500 - Subsidy					1,069	Public Housing
THA SUBTOTAL					1,491,800	
Hillside Terrace 2 & 1500					3,442	
Bay Terrace I & II & Community Facility					9,305	
Arlington Youth Campus					2,599	
Court F (The Rise)					1,767	Tax Credit Projects - Reimbursable
Renew Tacoma Housing					18,496	
Salishan 1 - Salishan 6					13,489	
TAX CREDIT SUBTOTAL (Operations & Development - billable)					49,097	1,540,897
Section 8 Checking Account (HAP Payments)						
SRO/HCV/VASH/FUP/NED		Check #'s	484,348	-	484,459	176,152
		ACHs	6,780	-	7,699	3,589,218
Payroll & Payroll Fees - ADP					\$	3,765,370
TOTAL DISBURSEMENTS					\$	6,173,886

TACOMA HOUSING AUTHORITY

CASH POSITION - April 2021

Account Name	Current Balance	Interest
HERITAGE BANK		
Accounts Payable	4,791,720	0.29%
Section 8 Checking	5,015,063	0.29%
THA Affordable Housing Proceeds-Salishan	1,970,273	0.29%
THA Scattered Sites Proceeds	5,881,632	0.29%
FSS Escrows	219,983	0.29%
CSA Escrows	123,251	0.29%
Note Fund Account	103	0.29%
Credit Card Receipts	29	0.29%
Key Bank Security Deposits	1,052	0.29%
Relocation Account	5,006	0.29%
THA Investment Pool	337	0.29%
THDG - Tacoma Housing Development Group	994,728	0.29%
Salishan 7 Operations	1,618,484	0.29%
Salishan 7 Security Deposit	28,928	0.29%
Salishan 7 Replacement Reserve	447,566	0.29%
Salishan 7 Operating Reserve	203,487	0.29%
Highland Crest Operations	1,263,837	0.29%
Highland Crest Replacement Reserve	289,432	0.29%
Highland Crest Security Deposit	39,399	0.29%
Outrigger Operations	533,496	0.29%
Outrigger Replacement Reserve	222,100	0.29%
Outrigger Security Deposit	20,590	0.29%
Prairie Oaks Operations	189,060	0.29%
Prairie Oaks Replacement Reserve	34,887	0.29%
Prairie Oaks Security Deposit	6,368	0.29%
Payroll Account	5,420	0.29%
HOME STREET BANK		
James Center North Operations	873,232	0.00%
James Center North Security Deposit	56,801	0.00%
WASHINGTON STATE		
Investment Pool	\$ 1,525,338	0.10%
1. TOTAL THA CASH BALANCE	\$ 26,361,600	
Less:		
2. Total MTW Cash Balance	\$ 1,014,658	
Less Minimum Operating Reserves		
2.01 Public Housing AMP Reserves (4 months Operating Exp.)		
2.02 S8 Admin Reserves (3 months Operating Exp.)		726,000
2.09 Less Total Minimum Operating Reserves		\$ 726,000
2.1. MTW Cash Available (Lines 2-2.09)	\$ 288,658	
3. MTW Cash Held By HUD	\$ 5,769,493	
4. Non MTW Cash Restrictions/Obligations		
4.1 Non MTW Operational Restrictions		
4.10 HUD Restricted - Lot and Property Sales		\$ 7,851,905
4.101 Area 2B Sales Proceeds (Afford Hsg)		1,970,273
4.102 Scattered Sites Proceeds (Afford Hsg)		5,881,632
4.15 HUD Restricted - CARES Act (Covid-19)		\$ 64,033
4.151 Unspent CARES Act Funding		64,033
4.20 THA Property Accounts Reserved		\$ 2,593,002
4.201 Security Deposit Accounts		153,137

TACOMA HOUSING AUTHORITY
CASH POSITION - April 2021

4.202 Highland Crest Operations Reserves	320,000		
4.203 Highland Crest Replacement Reserves	289,432		
4.204 James Center North Operations Reserves	230,000		
4.205 James Center North Capital	274,880		
4.206 Outrigger Operations Reserve	150,000		
4.207 Outrigger Replacement Reserves	222,100		
4.208 Prairie Oaks Operations Reserves	77,000		
4.209 Prairie Oaks Replacement Reserves	74,887		
4.210 Salishan 7 Operations Reserves	354,000		
4.211 Salishan 7 Replacement Reserves	447,566		
4.30 Rental Assistance Reserves	\$ 971,168		
4.301 Mod Rehab Operating Reserves	78,296		
4.302 VASH, FUP, MAIN & NED HAP Reserves	660,602		
4.303 FSS Escrows	232,270		
4.40 Prepaid Grants	\$ 2,569,534		
4.401 TPS Interlocal (CS-2017-011)	233,360		
4.402 UWPC - Strong Families (CS-2018-003)	37,538		
4.403 Balmer Foundation - Education Prog (CS-2020-005)	667,554		
4.404 College Spark (PI-2018-005)	74,176		
4.405 GTCF Grant (PI-2019-005)	161,156		
4.406 Foundation for Tacoma Students (PI-2019-009)	19,803		
4.407 Gates - THA Education Program (PI-2020-006)	292,217		
4.408 Kresge Foundation - CHAP Program (RA-2019-009)	39,002		
4.409 Ballmer Foundation - COVID Rent Assist (RA-2020-003)	50,000		
4.410 THDG	994,728		
4.50 BFIM Buyout LOC Collateral-Potential Tax Credit Loss	\$ 2,500,000		
4.60 Total - Non MTW Cash Restrictions (4.10+4.20+4.30+4.40+4.50)	\$ 16,549,643		
4.70 Agency Contracted or Budgeted Commitments Remaining	\$ -		
	-		
	-		
4.99 Total Non MTW Cash Restrictions/Obligations (Lines 4.60+4.70)	\$ 16,549,643		
5. THA UNENCUMBERED (Non-MTW) CASH (Lines 1-2-4.99)	\$ 8,797,299		
6. Development Advances - Project Reimbursement upon closing/draw	\$ -		
6.01 Arlington Crisis Residential Center	-		
6.02 Arlington Youth Housing	-		
6.03 Court F LLLP (1800 Block)	-		



TACOMA HOUSING AUTHORITY

**POLICY, INNOVATION, AND
EVALUATION**



TACOMA HOUSING AUTHORITY

DATE: June 23, 2021

TO: THA Board of Commissioners

FROM: Katie Escudero
Interim Director of Policy, Innovation and Evaluation

RE: Policy, Innovation and Evaluation (PIE) Department Board Report

PIE continues to support the agency's efforts to respond to the COVID-19 pandemic and racial injustices at the local and national level. With much of the agency's focus on emergency response and recovery, some of PIE's long-range projects remain on hold. Yet we continue our work to develop and evaluate innovative policies and programs with a mindfulness of the operational capacity needed to implement new policy or make program pivots. In addition, PIE staff continue to lend their capacity to agency-wide efforts, including to reopening planning and serving on the IT Advisory Committee.

1. Staffing Update

The Data Analyst position was recently moved back to PIE. This change aligns with the department's focus on increasing its analytic capacity, providing technical assistance to the agency on evaluation and data-based decision making, and leveraging data sharing collaborations with external partners. PIE is pleased to welcome Daniel Stutman to the team, who started on June 21st. Daniel most recently served with the COVID-19 Data & Surveillance Branch of the Operations Section of Tacoma-Pierce County Health Department's Incident Command Structure. He served as the quantitative data analyst for the School-Based Testing Pilot, which sought to better understand the efficacy of school-based testing strategies.

2. 2020 Moving to Work (MTW) Report Submission

PIE submitted the 2020 MTW Report to Housing and Urban Development (HUD) on March 31st. The report, appended, provided an update on the outcomes of THA's MTW initiatives and investments. Some highlights include:

- Leveraging MTW flexibility to adjust operations and continue to provide seamless service in the face of the COVID-19 pandemic.
- Serving more than 500 households through local, non-traditional subsidy programs.
- Launching the Tacoma Schools Housing Assistance Program (TSHAP), which serves Tacoma Public Schools students who are experiencing homelessness and their families.
- Completing Arlington Drive Youth Campus and The Rise on 19th.
- Dedicating an additional 74 property-based subsidies to college students experiencing homelessness.

These accomplishments were made possible by THA's MTW flexibility, which allows the agency to be nimble and responsive to local priorities and needs. In 2020, this flexibility was critical to

THA's ability to pivot and continue to provide excellent customer service and supports to the communities it serves.

3. MTW Virtual Site Visit

On June 1st, PIE hosted HUD Field Office and MTW staff for a virtual site visit. Site visits are dictated by our MTW Agreement and typically occur on a biennial schedule. Given the pandemic, this year's visit was virtual and more informal than past years. As usual, this meeting provided THA the opportunity to share more about its initiatives, ask for guidance or technical assistance from HUD, and discuss any emergent issues. Topics discussed this year included: Emergency Housing Vouchers, COVID-19 pandemic response efforts, MTW expansion, and utilization.

4. College Housing Assistance Program (CHAP) Evaluation Brief

On June 10th, Temple University's Hope Center published "A First Look at Impacts of the College Housing Assistance Program at Tacoma Community College". This report is the first publication to come out of the from Hope Center's third-party evaluation of the College Housing Assistance Program (CHAP). The evaluation focuses on students at Tacoma Community College (TCC) who applied to the program for a tenant-based subsidy between 2017 and 2019. The most significant finding from the report is that only one quarter of applicants were able to secure housing with the voucher. Older students, women, and students with stronger academic profiles were overrepresented in the group of housed students. Black students were underrepresented. The report goes on to discuss the barriers to program admission and leasing (e.g., the complexity of the HUD application, proficiency navigating bureaucracies, etc.). Additionally, the authors cite the importance of adequate and trained staff who can help students navigate the program's complexity. Lastly, the report makes note that admission to the program does not appear to have significant or positive academic impact. However, the data is limited to only the first terms participants are on the program so future reports should be able to uncover if there are any longer-term program impacts. The researchers are hosting two webinars to discuss the report – one was held June 17th and another is being scheduled for the end of July.

5. Department of Corrections Voucher Program

PIE staff met with Department of Corrections (DOC) housing staff to discuss a deployment of the 25 vouchers that were originally set aside for DOC-CHAP. Given the economic impacts of COVID-19 and programmatic challenges identified in CHAP, PIE staff are proposing implementing a more traditional voucher subsidy program that assists households exiting from the criminal justice system. DOC is consulting its data to identify the best referral source for these subsidies. Once the referral source and other operational elements are designed, PIE staff will bring a program proposal to the Board.

6. Housing Opportunity Program (HOP) Subsidies Report

For the past several months, the Board has been hearing about the PIE evaluation of HOP and other evaluations of fixed-subsidy, time-limited THA programs. This month you will see a resolution for an Executive Action allowing for a continued moratorium on time limit-driven program exits and suspension of non-housing related program conditions.

PIE is continuing its work on the HOP subsidies report, originally introduced at the April Board meeting. This report summarizes the available evidence on the programs' efficacy, before and after the pandemic, by exploring four overarching themes that reflect the program life cycle:

1. Leasing: At what rate do HOP households successfully lease a unit?
2. Income: Does a HOP household's income change while receiving assistance?
3. Program Exits: When and why does a HOP household exit the program?
4. Rent Burden: What level of market rent burden does a HOP household face at exit?

The general Housing Choice Voucher (HCV) population is being used as a comparison group when data is available. The team anticipates presenting the report at an upcoming Board meeting, after it has undergone internal review.

Tacoma Housing Authority MOVING TO WORK REPORT

2020

Submitted: March 31, 2021



Tacoma Housing Authority Board of Commissioners

Stanley Rumbaugh, Chair
Shennetta Smith, Vice Chair
Dr. Minh-Anh Hodge
Derek Young
Pastor Michael Purter

Tacoma Housing Authority

902 S. L Street
Tacoma, WA 98405

Michael Mirra

Executive Director

April Black

Deputy Executive Director

Director of Policy, Innovation and Evaluation

Barbara Tanbara

Interim Director of Human Resources

Cacey Hanauer

Director of Client Support and Empowerment

Kathy McCormick

Director of Real Estate Development

Ken Shalik

Director of Finance

Frankie Johnson

Director of Property Management

Sandy Burgess

Director of Administrative Services

Julie LaRocque

Director of Rental Assistance

Report Prepared by:

Ava Pittman

Planning and Policy Analyst



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Section I: Introduction and Overview

This report covers January 1, 2020 through December 31, 2020.

This past year brought new and unexpected challenges attributed to the global health pandemic and the resulting economic fallout to the Tacoma Housing Authority (THA) and the communities we serve. Events in 2020 also reinvigorated a long overdue conversation and response to systemic racism. This context required THA to improvise and find new ways of doing our work while doubling down on our social justice mission. It also reaffirmed the value of Moving to Work (MTW) and the flexibility it provides us to improvise and respond to emergent needs.

Prior to the pandemic, the local housing market was struggling to keep pace with need. A housing shortage, in-migration of higher wage earners, and gentrification created an untenable situation for people with low incomes, even before the added stress of COVID-19. THA continued to address this issue through its real estate development strategies, including the construction and acquisition of affordable housing units. Despite the unpredictable nature of operating in the midst of a pandemic, THA was able to complete two development projects: Arlington Drive Youth Campus for youth and young adults experiencing homelessness and The Rise on 19th which provides housing to low-income households, veterans experiencing homelessness and their families, and households with a member who has a disability.

Leveraging our MTW flexibility and in partnership with local providers, THA has designed programs that meet the needs of diverse individuals and families, including Tacoma Public School students experiencing homelessness and their families; college students who are housing insecure and homeless; and child welfare system-involved youth and families. In late 2020, to ensure these particularly marginalized households and others served through THA's federally subsidized programs remained stably housed, THA implemented the Late Rent program that leveraged Pierce County's CARES Act funding. This program assisted 592 THA households with back rent that was accumulated during the first several months of the pandemic.

While the pandemic highlighted and exacerbated systemic inequities across health, economic, educational, and housing outcomes, THA held steady to its mission that seeks to address these challenges over the long-term while being responsive to the health and safety needs of the community we serve. Moving to Work is essential in our ability to advance long-term strategies while remaining nimble and responsive to emergencies, such as those presented to us in 2020.

LONG TERM GOALS & OBJECTIVES

In 2020, THA continued to take an active role in its long-term vision for its city. THA's Board of Commissioners has stated this vision clearly:

"THA envisions a future where everyone has an affordable, safe and nurturing home, where neighborhoods are attractive places to live, work, attend school, shop and play, and where everyone has the support they need to succeed as parents, students, wage earners and neighbors."

THA acknowledges that such a future is not pending, or presently plausible. This makes THA's mission that much more urgent. THA's Board of Commissioners has also stated that mission clearly:

"THA provides high quality, stable and sustainable housing and supportive services to people in need. It does this in ways that help them prosper and help our communities become safe, vibrant, prosperous, attractive and just."

THA's Moving to Work (MTW) designation is essential to this effort. MTW status does not give THA more funding from HUD. Instead, and critically, MTW status makes the funding more flexible. It allows THA to design its programs to better serve Tacoma's community in ways that best account for Tacoma's local needs and markets as THA and its community judges them to be.

THA's vision and mission align completely with the three MTW statutory objectives:

1. Increase housing choices for low-income families
2. Give incentives to families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that help people obtain employment and become economically self-sufficient
3. Reduce cost and achieve greater cost effectiveness in federal expenditures

THA looks forward to determining effective uses of MTW authority for these purposes.

THA's Board has chosen the agency's seven strategic objectives, each with performance measures that will guide the agency through the coming years. See [*Appendix C: THA's Strategic Objectives with Performance Measures*](#).

In general, these strategic choices have THA provide high quality housing and supportive services to people with low incomes, with a focus on the most marginalized. THA will seek to do this in ways that also achieves two other objectives. **First**, it seeks to help people who can work to succeed, not just as tenants but also, as THA's vision statement and strategic objectives contemplate, as "parents, students, wage earners and builders of assets". It wants their time on its housing programs to be transforming in these ways, and temporary. It wants this certainly for grownups but emphatically for children because it does not wish them to need its housing when they grow up. **Second**, THA seeks to help the City of Tacoma develop and to help ensure that when the city does develop it does so equitably. It seeks this so that Tacoma becomes a place that households of all incomes, races, needs and compositions experience that, as THA's mission statement contemplates, is "safe, vibrant, prosperous, attractive, and just." THA's seven strategic objectives and strategies are ambitious and require all tools within reach, including MTW flexibility.

SHORT TERM GOALS & OBJECTIVES

The pandemic required us to relearn ways to do our work while preserving our social justice mission. That work included managing a large and varied portfolio of properties that house vulnerable households; paying the rent on behalf of thousands of voucher clients to hundreds of landlords in amounts that must be recalculated to account for lost income; completing large, complicated construction projects; and providing supportive services to an increasingly stressed population of clients, including now the delivery of food to seniors and other high-risk households. THA's mission comes in parts. In 2020, all of them saw challenge, innovation, and expansion.

Housing and Supportive Services

THA helps people pay rent to private landlords. Our rental assistance programs do that in partnership with hundreds of landlords, large and small. Measured by people served and dollars spent, these programs are our largest. We serve about 4,000 households this way.

In partnership with Pierce County Department of Human Services, we also help to fund our county's rapid rehousing program for homeless families with children and young adults experiencing homelessness. In 2020, THA expanded this program by launching the Tacoma Schools Housing Assistance Program (TSHAP), which targets Tacoma Public Schools students who are experiencing homelessness and their families. In addition to housing assistance, participants receive case management and other supportive services according to their individual need.

Another way THA targets its assistance to those with immediate housing needs is by contracting with market-rate properties through our Property-Based Subsidy activity which works similarly to project-based vouchers. This year, two properties began leasing, one property serving individuals with mental disabilities who are exiting shelters or the streets; and the other for College Housing Assistance Program (CHAP) participants which include students experiencing homelessness from the University of Washington in Tacoma and Tacoma Community College.

The pandemic gave these rental assistance programs an extra significance. They helped families stay in place which also helped our landlord partners, especially the smaller ones, survive their tenants' loss of income without evictions during the eviction moratorium. While other tenants were defaulting on their rents, for THA's voucher clients, THA paid its share of their rent on time, in full, and in increasing amounts as tenant incomes fell.

Housing and Real Estate Development

Tacoma's new rental market continues to get more expensive. Our voucher subsidy struggles to keep pace with the rising rents. Our clients must compete for fewer vacancies with other households having stronger credit, rental, or criminal histories. In response, THA is emphasizing its other strategies. One way we do that is by building, buying, and rebuilding properties that we then keep permanently affordable to people with low incomes. We are one of the city's largest real estate developers and the largest residential landlord. We serve about 1,500 households in this way.

This year, despite the challenges brought forth by the pandemic, THA's portfolio continued to grow:

- **Arlington Drive Youth Campus:** The Arlington Drive Youth Campus was completed in 2020. In late 2020, we were able to open the doors to the Crisis Residential Center/HOPE Facility and the Arlington Apartments with 58 apartments for homeless young adults 18 – 24 years old. We do this in partnership with The Social Impact Center of the YMCA of Greater Seattle and Community Youth Services to provide the specialized services for the young adults who walk through Arlington's Doors seeking shelter from the streets.
- **The Rise on 19th:** In late 2020, we opened the Rise on 19th, which has 64 affordable apartments with 14 reserved for Veterans experiencing homelessness, and their families. The Department of Veteran Affairs will refer them and provide them with supportive services. Another 14 apartments are for households with a member who has a disability.

THA does not confine our mission to being a landlord and disbursing monthly rental assistance checks. We are also real estate and community developers. We seek ways to spend our housing dollar to leverage other outcomes among the families we serve including increased earned income, improved educational outcomes, and improved asset building. One example of our community development work is Housing Hilltop, which is a development project that brings four neighboring sites together to form a resilient, mixed-use core of affordable homes in the rapidly changing Hilltop neighborhood of Tacoma. Working closely with local partners, we completed Hilltop Master planning to develop the neighborhood plan for affordable housing, retail, and community public space.

Property Management

THA used MTW dollars to maintain its public housing portfolio and convert its portfolio to Rental Assistance Demonstration (RAD) financing. That portfolio is valuable. It serves THA's lowest income households facing the greatest barriers, including people with disabilities, seniors,

households coming from traumatic situations, and those who do not speak English. This use of MTW dollars is also how THA can bring investments to neighborhoods that need it and to spur their development in ways that benefit all their residents.

Despite numerous challenges with social distancing and additional safety precautions, the team remained diligent at keeping the numbers down for turns and leasing – ensuring families get into units quickly. We found ways to alleviate some of the anxiety around rent and other charges owed because of COVID-19 by adjusting our repayment agreement policies. Eligible households will find relief to spread these charges out over time, as some move through unemployment and layoffs. The morale of the team is of the utmost importance during these challenging times. Support and resources are offered daily as we provide the essential work needed to keep the agency moving.

Financially Sustainable Operations

THA completed its RAD conversion of Salishan and Hillside Terrace portfolios from public housing to RAD PBV vouchers, improving the financial operations of these properties. Conversion of the Renew Tacoma portfolio in 2016 has improved the operational sustainability of that portfolio by improving the subsidy, as well as reducing operational costs in these properties.

With the acquisition of additional units and property in Tacoma's West End neighborhood, THA is receiving additional unsubsidized rental income to help offset the cost of operations.

Environmental Responsibility

THA staff began working with a small group of community leaders to set the foundation for establishing an Eco-District in the Hilltop. The Eco District framework is based on three Imperatives—Equity, Resilience and Climate Protection. The working group has added three additional imperatives—Economic Development & Jobs, Affordable Housing and Culture. The goal of the working group is for the Eco District to create a set of standards and metrics for future development in the Hilltop. This is an outgrowth of the community engagement work done for THA's four parcels. To help build community on the Hilltop, THA and the Hilltop Action Coalition are co-sponsoring bi-monthly events, Hilltop Happenings.

Advocacy

THA continued its partnership with Forterra and the University of Washington-Tacoma to review the advocacy effort with the City Council for effective affordable housing policies. These policies include: (i) a local housing trust fund, (ii) inclusionary and incentive zoning to require in some cases and entice in others the inclusion of affordable housing in a market rate development. (iii) a contingent loan program to

lower borrowing costs for affordable housing development. THA continues to be available as a source of data and advice to the city, county state and national policy makers on housing, community development and related topics.

Administration

THA seeks to improve its administration by continuing to invest in our IT platform and ramp up our Process Improvement and documentation effort. We also began work to upgrade our website. In 2020 the agency hired a consultant to assist us in mapping out the best path for ongoing success for this project. We intend on hiring the additional staff needed for the Process Improvement effort in early 2021. It is anticipated that this will be at least a 3-year intensive effort, with ongoing updates and maintenance after that period.

In the face of tremendous challenge and devastation, THA continued to provide housing assistance and supportive services that enabled the individuals and families we serve remain stable, safe, and healthy.

Section II: General Operating Information

Housing Stock Information

Actual New Project Based Vouchers

Tenant-based vouchers that the MTW PHA project-based for the first time during the Plan Year. These include only those in which a Housing Assistance Payment (HAP) Agreement was in place by the end of the Plan Year. Indicate whether the unit is included in the Rental Assistance Demonstration (RAD).

Property Name	Number of Vouchers Newly Project-Based		RAD?	Description of Project
	Planned*	Actual		
Home at Last	30	30	No	A partnership with the YWCA to provide housing assistance for extremely, low-income, homeless households fleeing domestic violence.
Arlington Drive Apartments	58	58	No	Arlington Drive Apartment will provide housing to young adults near and/or are homeless.
Hillside 1800	64	64	No	Hillside 1800 is within THA's portfolio that will house low-income households.

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Planned/Actual Total Vouchers Newly-Project Based

*Figures in the "Planned" column should match the corresponding Annual MTW Plan.

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

Home at Last – The development is expected to be completed by February 2021. THA anticipates that leasing will begin in March 2021.
Both Arlington Drive Apartments and Hillside 1800 did not begin leasing until the end of 2020.

Actual Existing Project Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which a HAP Agreement was in place by the beginning of the Plan Year. Indicate whether the unit is included in RAD.

Property Name	Number of Project-Based Vouchers		Status at End of Plan Year**	RAD?	Description of Project
	Planned*	Actual			
Bay Terrace	26	26	Leased	Y	THA family housing
Bay Terrace 1	20	20	Leased	N	THA family housing
Bay Terrace 2	52	52	Leased	N	THA family housing
Hillside 2	13	13	Leased	N	THA family housing
Hillside 2 (RAD)	33	33	Leased	Y	THA family housing
Hillside Gardens	8	8	Leased	N	Third-party housing for families experiencing homelessness
Hillside Terrace 1500	12	12	Leased	N	THA family housing
Salishan Five	45	45	Leased	N	THA family housing
Salishan Four	45	45	Leased	N	THA family housing
Salishan One	35	35	Leased	N	THA family housing
Salishan Six	45	45	Leased	N	THA family housing
Salishan Three	45	45	Leased	N	THA family housing
Salishan Two	35	35	Leased	N	THA family housing
Tyler Square	15	15	Leased	N	Third-party housing for families experiencing homelessness

Salishan Seven	90	90	Leased	Y/N	THA family housing (excludes the recently converted public housings reported in the New Project-Based section above)
Renew Tacoma Housing	456	456	Leased	Y	THA's Renew Tacoma Housing includes all of THA's elderly/disabled sites
Harborview Manor	147	147	Leased	N	Third-party affordable housing for seniors
New Tacoma Phase 2	8	8	Leased	N	Third-party affordable housing for seniors
Eliza McCabe Townhomes	10	10	Leased	N	Third-party housing for families experiencing homelessness
Flett Meadows	13	13	Leased	N	Third-party housing for families experiencing homelessness
Guadalupe Vista	38	38	Leased	N	Third-party housing for families experiencing homelessness
Pacific Courtyards	23	23	Leased	N	Third-party housing for households experiencing homelessness
Home at Last	30	30	Committed	N	Third-party housing for households fleeing domestic violence
Olympus Apts.	26	26	Leased	N	Third-party housing with affordable housing for households at or below 50% AMI
Nativity House	50	50	Leased	N	Third-party permanent supportive housing for chronically homeless individuals

1,314	1,314
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Planned/Actual Total Existing Project-Based Vouchers

* Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of the Plan Year" from: Committed, Leased/Issued

Please describe differences between the Planned and Actual Number of Vouchers Project-Based:

None.

Actual Other Changes to MTW Housing Stock in the Plan Year

Examples of the types of other changes can include (but are not limited to): units held off-line due to relocation or substantial rehabilitation, local, non-traditional units to be acquired/developed, etc.

Actual Other Changes to MTW Housing Stock in the Plan Year
THA completed its redevelopment of its 1800 block of the property formerly known as Hillside Terrace. This is the third phase of the new Bay Terrace development and has 64 units developed with low-income housing tax credits and other financing sources. It also includes set-asides to serve individuals with disabilities and Veterans experiencing homelessness and their families.
THA will continue to seek to acquire existing housing in the market to preserve affordable housing for households earning up to 80% of the area median income (AMI).
THA added 74 Property-Based Subsidy units in 2020 to allow for 64 units at Koz at the Dome and 10 units at the Campbell Court Apartments.
THA's RAD conversion and disposition of its scattered site public housing through Section 32 was completed in 2020. This will leave THA with 719 public housing units available for use under faircloth. THA is considering placing Public Housing faircloth units in new acquisitions and new developments, and potentially other projects owned by others in the community.

General Description of All Actual Capital Expenditures During the Plan Year

Narrative general description of all actual capital expenditures of MTW funds during the Plan Year.

General Description of All Actual Capital Expenditures During the Plan Year

In 2020, THA used its remaining CFP funds to supplement MTW operations.

Leasing Information

Actual Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.

Number of Households Served Through	Number of Units Months Occupied/Leased*		Number of Households Served **	
	Planned^^	Actual	Planned^^	Actual
MTW Public Housing Units Leased	48	48	4	4
MTW Housing Choice Vouchers (HCV) Utilized	50,726	49,612	4,227	4,134
Local, Non-Traditional: Tenant-Based ^	2,824	1,903	235	159 ¹
Local, Non-Traditional: Property-Based ^	4,260	4,201	355	350
Local, Non-Traditional: Homeownership^	0	0	0	0
Planned/Actual Totals	57,858	55,764	4,821	4,647

¹ HUD has recently granted THA approval to include households served under this activity into its utilization 6 months post participation. THA began with households served from January 2018 through December 2018.

Please describe any differences between the planned and actual households served:

LNT: Tenant-Based: At the time of Plan submission, THA anticipated that TSHAP would be in effect at the beginning of 2020. Instead, TSHAP was launched later in the year and began enrolling families in September which is why there is a significant difference between planned and actual number of households served

LNT: Property-Based – Planned number of households served were based on predictions based on information available at the time of analysis. It also assumed a 100% utilization rate. However, in 2020 one property did not begin leasing until April 2020 and another development was slow to lease up.

MTW HCV – At the time of the Plan submission, THA planned for 125 CHAP vouchers and 25 DOC-CHAP vouchers for 2020. However, in 2020 THA decreased the number of CHAP vouchers from 125 to 75 vouchers and the 25 DOC-CHAP are still being held as the program is being developed.

Local Non-Traditional Category ⁷	MTW Activity Name/Number	Number of Units Occupied/Leased		Number of Households to be Served	
		Planned ^{^^}	Actual	Planned ^{^^}	Actual
Tenant-Based	Regional Approach To Special Purpose Housing/ ¹⁵ 15	2,824	1,903	235	159
Property-Based	Creation & Preservation of Affordable Housing/ ¹⁶ 16	4,260	4,201	355	350
Homeownership	N/A	0	0	0	0
Planned/Actual Totals		7,084	6,104	590	509

* The sum of the figures provided should match the totals provided for each Local, Non-Traditional category in the previous table. Multiple entries may be made for each category if applicable.

* ^ Figures and text in the "Planned" column should match the corresponding Annual MTW Plan.

Households Receiving Local, Non-Traditional Services Only	Average Number of Households Per Month	Total Number of Households in the Plan Year
-	0	0

Waiting List Information

Actual Waiting List Information

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The “Description” should detail the structure of the waiting list and the population(s) served.

Waiting List Name	Description	Number of Households on Waiting List	Waiting List Open, Partially Open or Closed	Was the Waiting List Opened During the Plan Year
2020 Consolidated Waitlist	Community wide – low-income households	1,806	Closed	Yes
Child Welfare Housing Program (CHOP)/Family Reunification Program (FUP – non-MTW)	Other - families reuniting	68	Open	Yes
Family & Young Adult Rapid Rehousing (Local Non-Traditional) THA <i>eligible only</i>	Community Wide – homeless families	258	Open	Yes

Please describe any duplication of applicants across waiting lists: No duplication across waitlists

Actual Changes to Waiting List in the Plan Year

Please describe any actual changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

Waiting List Name	Description of Actual Changes to Waiting List
Consolidated Waitlist (Low Income Housing and Housing Opportunity Program)	Throughout 2020, THA maintained its 95% utilization goal and consequently did not open its waitlist or issue new HOP subsidies. THA streamlined its process for identifying and processing waitlist applicants who needed a Reasonable Accommodation. This was a measure to place households in a unit that meets their needs without delaying the application and housing process to complete the Reasonable Accommodation process. It has been a great benefit to the applicant and THA's Property Management leasing staff. THA has also focused on its transfer waitlist to get current THA tenants in either the right-sized unit or to accommodate an approved Reasonable Accommodation. This has included issuing income-based vouchers (versus our standard HOP subsidy) as well as transferring as part of the initial lease-up at The Rise, our new development for family housing.

Information on Statutory Objectives and Requirements

75% of Families Assisted Are Very Low Income

HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual households served upon admission during the PHA's Fiscal Year reported in the "Local, Non-Traditional: Tenant-Based"; "Local, Non-Traditional: Property-Based"; and "Local, Non- Traditional: Homeownership" categories. Do not include households reported in the "Local, Non-Traditional Services Only" category.

Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
Above 80% Area Median Income	0
80%-50% Area Median Income	11
49%-30% Area Median Income	122
Below 30% Area Median Income	111
Total Local, Non-Traditional Households Admitted	244

Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

Baseline for the Mix of Family Sizes Served (upon entry to MTW)					
Family Size	Occupied Number of Public Housing units	Utilized HCVs	Non-MTW Adjustments *	Baseline Mix Number	Baseline Mix Percentage
1 Person	53	1,857	0	1,851	42.58%
2 Person	106	754	0	860	19.77%
3 Person	82	502	0	679	15.62%
4 Person	42	300	0	460	10.58%
5 Person	29	237	0	287	6.60%
6+ Person	17	179	0	210	4.85%
Totals	329	3,829	0	4,347	100%

* “Non-MTW Adjustments” are defined as factors that are outside the control of the MTW PHA. An example of an acceptable “Non-MTW Adjustment” would include demographic changes in the community’s overall population. If the MTW PHA includes “Non-MTW Adjustments,” a thorough justification, including information substantiating the numbers given, should be included below.

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

None

FAMILY SIZE	BASELINE MIX PERCENTAGE**	NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	42.58%	2,005	48%	5.42%
2 Person	19.77%	815	20%	-0.23%
3 Person	15.62%	573	14%	-1.62%
4 Person	10.58%	324	8%	-2.58%
5 Person	6.60%	247	6%	-0.6%
6+ Person	4.85%	185	4%	-0.85%
TOTAL	100%	4,149 ²	100.00%	0.00%

** The “Baseline Mix Percentage” figures given in the “Mix of Family Sizes Served (in Plan Year)” table should match those in the column of the same name in the “Baseline Mix of Family Sizes Served (upon entry to MTW)” table.

^ The “Total” in the “Number of Households Served in Plan Year” column should match the “Actual Total” box in the “Actual Number of Households Served in the Plan Year” table in Section II.B.i of this Annual MTW Report.

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the “Total” number of households served in the Plan Year. These percentages will reflect adjustment to the mix of families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline Year must be provided below.

² THA is unable to report “Mix of Family Size” to match “Actual Households Served.” The former is based on actual households served versus the prescribed calculation used to derive “Actual Households Served.”

Please describe the justification for any variances of more than 5% between the Plan Year and Baseline Year:

THA's local, non-traditional households are excluded from the households reported in the above table. The exclusion of these households would change the numbers above, most notably, the number of single households utilizing traditional THA units and vouchers. The percentage changes from our baseline year are more pronounced due to the exclusion of our LNT households.

Number of Households Transitioned to Self-Sufficiency in the Plan Year

Number of households, across MTW activities, that were transitioned to the MTW PHA's local definition of self-sufficiency during the Plan Year.

MTW Activity Name/Number	Number of Households Transitioned to Self- Sufficiency*	MTW PHA Local Definition of Self-Sufficiency
Local Policy for Work-Able Households/5	15	Exited or graduated with market rent burden <=50%
Regional Approach to Special Purpose Housing/15	4	Exited or graduated with market rent burden <=50%
Housing Opportunity Program/17	8	Exited or graduated with market rent burden <=50%
Modify the FSS Program/19	15	Exited or graduated with market rent burden <=50%
	15	(Households Duplicated Across MTW Activities)

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Total Households Transitioned to Self Sufficiency

* Figures should match the outcome reported where metric SS#8 is used in Section IV of this Annual MTW Report.

Section III. Proposed MTW Activities

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

Section IV. Approved MTW Activities

1. Extend Allowable Tenant Absence from Unit for Active Duty Soldiers

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: THA modified its policy for terminating households who were absent from their unit for more than 180 days. THA's programs have a number of reserve or guard military families because of close proximity to Fort Lewis, one of the nation's largest military bases. Active duty may force a household to be absent from their assisted unit for more than 180 days, the amount of time the normal rules allow, leaving them without housing assistance when the service member returns home. Although the question of having to terminate such a household of service men and women arose only a few times during the Iraq war, the prospect of terminating them was too unsettling even to risk. This activity enabled THA to allow a previously assisted households returning from deployment to request reinstatement within 90 days from the date they return from deployment.

Impact: THA has not needed to use this flexibility since its implementation. However, this activity provides the flexibility to honor an active service member's call to duty and permits the household to request reinstatement once they return from a deployment.

Update: This activity was not used in 2020.

HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of active duty soldiers at or below 80% AMI that would lose assistance or need to move (decrease).	0 soldiers	0 soldiers	0 soldiers	Met

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection process.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

3. Local Project- Based Voucher Program (HCV)

Plan Year Approved, Implemented, Amended: THA proposed this activity in 2011 and it has been completely implemented.

Description: In 2011, THA implemented a local project-based voucher program to increase the number of vouchers that THA can project base. The local program includes the following:

- **Remove 20% cap on project-based vouchers for THA developments:** THA removed the cap on project-based vouchers for its own developments to allow THA to finance more developments in the future. In 2018, THA modified the activity by waiving the per project cap on a case-by-case basis for projects, including those not owned by THA; and allowing individual project owners to manage their own waiting lists. The changes have allowed THA to streamline many parts of the project-based program that were inefficient or unfair to those on the waitlist.
- **Modified Choice Mobility options for non-RAD, PBV households:** THA initially used this activity to waive the mobility option that allowed PBV tenants to automatically receive a tenant-based voucher after one year of occupancy. Once THA converted a majority of its PBV units to RAD-PBV, THA revised its Choice Mobility policies. The RAD rules require THA to offer Choice Mobility vouchers to RAD-PBV tenants. In 2017, THA's board approved a revised version of this policy that made Choice Mobility available to *all* PBV tenants – given that certain criteria were met. PBV households that wish to exercise Choice Mobility must meet the following requirements: 1) in good status/no debts owed; 2) one-time use policy 3) required pre-issuance counseling; 3) unpaid tenant charges could result in termination of voucher assistance. THA grandfathered in anyone who had a PBV before October 1, 2011.
- **Established a reasonable competitive process and contract terms for PBV assistance:** THA established a reasonable competitive process and contract terms which includes the length of the contract for project-basing HCV assistance at units owned by for-profit or non-profit entities. Units must meet existing HQS or any standard developed by THA and approved by HUD pursuant to the requirements of this Restated Agreement.
- **In-house Housing Quality Standards (HQS) inspections:** In 2012, THA began conducting its own Housing Quality Standards (HQS) inspections on units it owns or has interest in and conducts its own contract rent negotiations and rent reasonableness determinations.

Impact: It's been several years since this activity's initial implementation and THA has been conducting its own inspections on all owned project-based units. The largest benefit that THA realizes from in-house inspections is the ability to monitor and control the quality of HQS inspections.

THA takes pride in its portfolio and this allows THA to ensure its clients reside in safe and decent housing. Another significant benefit is the opportunity to build relationships with property owners. THA inspectors take on the role of liaisons between THA housing specialists and property owners which helps THA maintain these important relationships.

This flexibility has also enabled THA to partner with local partners to serve households that have experienced homelessness and/or need supportive services provided by THA's community partners.

Update: There were no updates to this activity in 2020. However, in comparison to last year, THA conducted significantly less inspections due to the COVID-19 pandemic and social distancing requirements. After March 2020, THA limited inspections to initial and turnover inspections only.

In 2019, THA brought over 200 property-based subsidies online which resulted in a large number of inspections last year which explains why outcomes for this activity are significantly different.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease). Cost of in-house PBV inspections compared to third party.	\$49,560	\$39,648 (20% decrease)	\$12,312	Met

HC #4: Displacement Prevention				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households at or below 80% AMI that would lose assistance or need to move (decrease).	TBD	TBD	TBD	TBD

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection:

CE #2: Staff Time Savings – This metric has been removed. THA uses its MTW flexibility to conduct in-house inspections for PBV units for cost savings and quality control. There are no time savings by conducting in-house inspections.

CE#1: Agency Cost Savings – For 2020, THA updated the baseline based on a third-party invoice for annual inspection reviews. THA applied the costs to conduct each annual HQS inspection to the number of PBV inspections completed by THA in 2020. The invoice does not include charges for administrative or other miscellaneous tasks to come to an “apples-to-apples” comparison.

Previously the baseline was the cost of PBV inspections from the initial implementation of this activity in 2012. The number of PBV units in THA’s portfolio has increased significantly since implementation. THA compares the costs to conduct the same inspections in the given year by a third party to costs of conducting inspections in-house. THA hopes to achieve a 20% savings by conducting in-house inspections which determines the benchmark.

HC #4: Displacement Prevention - THA will set baselines and benchmarks for HC #4 once the number of PBVs exceeds the 20% cap. CE #3 (Decrease in Error Rate of Task Execution) was deleted from this impact analysis. Error rates have not been collected for this initiative throughout its implementation and there are no plans to start tracking this metric.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

4. Allow Transfers Between Public Housing and Voucher Programs

Plan Year Approved, Implemented, Amended: This activity was proposed and implemented in 2011.

Description: THA permits public housing clients to transfer to THA's voucher programs under certain conditions such as when they are overhoused, underhoused or require a special accommodation not available in their current unit. Some clients opt for a voucher to find a suitable unit in the private market.

Impact: This activity has allowed public housing households transfer to more suitable housing by allowing the transfer between unit-based and tenant-based housing. Without this flexibility, households may have to wait longer for a home that accommodates their individual household's needs.

Update: Tacoma's private rental market is extremely competitive and can be difficult for public housing clients to secure affordable housing. A large majority of THA's public housing units have been converted to RAD-PBV. By the end of 2020, THA had a total of 4 occupied public housing units. THA does not have any public housing households waiting for a transfer. For these reasons, the number of households who have successfully transferred between Public Housing and voucher programs in 2020 was (0) zero.

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	0 households	0 Public Housing households transferred into voucher program and leased-up	Met

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: THA updated the benchmark to zero. Due to our large RAD conversion, we do not expect any public housing households to transfer between programs.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

5. Local Policies for Fixed Income Households

Plan Year Approved, Implemented, Amended: THA received authorization for this activity in 2011 and it was fully implemented in 2013.

Description: This activity is for households in which all adult members are either elderly and/or disabled and at least 90% of total household income comes from a fixed source such as social security, SSI or a pension. For these households this activity includes the following:

- Annual recertifications are completed on a triennial schedule.
- Eliminated the elderly/disabled deduction.
- Eliminated the dependent deduction.
- Eliminate medical deductions below \$2500.
- Implement 28.5% TTP to help offset the elimination in elderly/disabled deduction and simplification of medical expense allowances.
- Implement a tiered rent model based on adjusted income bands.
- Implement local verification policies as outlined in Activity 7.
- Implement a minimum rent of \$25 (and therefore eliminate utility allowance reimbursements).

Impact: This activity has allowed THA to reduce some of the administrative workload for THA Housing Specialists. The program is overall easier to administer for both staff and THA clients.

Update: This year's time and cost savings outcomes reflect decreases in time spent processing annual recertifications. In 2020, the COVID pandemic required operational changes to adapt to social distancing requirements. THA relaxed its verification requirements and did most work digitally.

At the end of 2020, 1,242 fixed income households were subject to the MTW tiered rents (and minimum rent) and triennial recertification cycle outlined in this activity. The impact numbers reported below are generated from households on MTW tiered rents and triennial recertifications.

2020 staff costs include salaries and benefits. One reason for the variance from the benchmark is increased staffing costs since 2012. Although we are including an estimate of staff costs used to process this task, it does not equate to real cost savings as THA has not reduced staffing as a result of the changes.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	\$23,730 cost to complete all elderly/disabled certifications FY 2020 impacted by this activity	\$15,899 (33% decrease from baseline)	\$7,910 in staff costs related to processing fixed income reviews.	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	856 hours to complete all elderly/disabled certifications impacted by this activity	573 hours (33% decrease)	285 hours spent completing fixed income reviews	Met

CE # 5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total Household contribution towards housing assistance (increase). Average monthly tenant share.	\$0	\$286	\$250 average monthly tenant share (increase from last year)	Met

Hardships: One hardship granted under this activity in 2020.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: THA made changes to its baseline and benchmarks for both CE#1 and CE#2. The changes allow THA to compare time and cost savings as the populations evolve and grow. The baselines are determined by the time and costs needed to conduct

annual recertifications for all program participants impacted by this MTW activity. The benchmarks assume a reduction in time and costs by at least 33% since Housing Specialists are now conducting a third of recertifications each year due to this activity.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: For CE#5, Tacoma has seen rents rise steeply in the last few years. Households are experiencing higher rents in the private market or are receiving higher rent increases in their current units. Even with a subsidy, fixed-income households are paying more in rent than they have in previous years.

6. Local Policy for Work-Able Households (HCV/PH)

Plan Year Approved, Implemented, Amended: THA received authorization for this activity in 2011 and it was fully implemented in 2013.

Description: THA used this activity to implement rent reform for work-able households. Under this plan work-able households are subject to the following rent policy:

- Complete recertification reviews once every 2 years instead of every year (biennial recertifications) with no “off-year” COLA-related rent adjustments unless interim is triggered;
- Eliminate dependent deduction;
- Eliminate medical deductions below \$2500 and implement bands;
- Implement 28.5% TTP to help offset the dependent deduction;
- Implement a tiered rent model based on adjusted income bands;
- Implement local verification policies as outlined in Activity 7;
- Implement minimum rent of \$75 (and therefore eliminate utility allowance reimbursements).

Impact: This activity has helped THA’s Housing Specialists save time by reducing the number of recertifications to be completed each year. The biennial recertification schedule reduces the annual workload of Housing Specialists by decreasing the number of recertifications completed each year. Minimum rent is \$75 for this population and THA has seen an increase in tenant share as a result.

Update: At the end of 2020, 1,533 work-able households were subject to the MTW tiered rents (and minimum rent) and biennial recertification schedule outlined in this activity. The impact numbers reported below are generated from households on MTW tiered rents and biennial recertifications.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	\$36,284 cost to complete all work-able certifications impacted by this activity	\$18,142 (50% decrease)	\$18,142 staff costs	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	1,309 hours to complete all work-able certifications impacted by this activity	654 hours (50% decrease)	654 staff hours	Met

CE # 5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total household contribution towards housing assistance (increase). Average monthly tenant share.	\$0	\$704 (50% of 2-BD payment standard)	\$431 average monthly tenant share	Not met

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$12,372	\$21,060	\$26,950 *only includes HCV households with earned income	Met

SS #3: Increase in Positive Outcomes in Employment Status

Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
1) Employed full-time	323 households	693 households	464 households	Not met
	21%	45%	30%	Not met
2) Employed part-time	307 households	479 households	313 households	Not met
	29%	45%	20%	Not met
3) Enrolled in Educational Program	0	TBD	NA	THA will establish benchmark in 2023
	0%	TBD	NA	NA
4) Enrolled in Job Training	0	TBD	NA	THA will establish benchmark in 2023
	0%	TBD	NA	NA
5) Unemployed	Cannot establish baseline	154	762	Not met
		10%	50%	Not met

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	1,174 work-able households affected by this activity	Not to exceed 20% of work-able households	169 work-able households (11% of work-able receiving TANF)	Met

SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Workable households on traditional MTW rent calculation exiting the program with rent burden <50%	Exited with market rent burden <=50%: NA Average market rent burden (all traditional workable): NA	50% of exiting or graduating households will have market rent burden <=50%	Exited or graduated with market rent burden <=50%: 15 households (26% of all W/A exits) Average market rent burden (all traditional workable): 82%	Not Met.

Hardships: One (1) household in this program was granted a hardship in 2020.

Actual Non-Significant Changes: There were no changes to this activity.

Actual Changes to Metrics/Data Collection: THA made changes to its baseline and benchmarks for both CE#1 and CE#2. The changes allow THA to compare time and cost savings as the populations evolve and grow. The baselines are determined by the time and costs needed to conduct annual recertifications for all program participants impacted by this MTW activity. The benchmarks assume a reduction in time and costs by at least 50% since Housing Specialists are now conducting approximately half of the number of recertifications each year due to this activity.

THA made changes to baselines and benchmarks in 2017. The methodology established in the 2017 report has not changed, but variables will change over time. Metrics that have evolving benchmark are as follows:

SS#1: Increase in Household Income – the benchmark is based on Washington's minimum wage and an assumption of a 30/hour work week. The benchmark will be revised in subsequent MTW reports as the minimum wage changes.

SS#3: Increase in Positive Outcomes in Employment Status - THA has established new benchmarks for full- and part-time and unemployed participants. Because the size of this population fluctuates from year-to-year, a percentage-based benchmark will be applied to the number of households in order to establish numerical benchmarks.

CE#5 : Increase in Agency Rental Revenue - THA will now report average monthly tenant share which helps to isolate the rent change impact better than overall rent revenue which will fluctuate with population changes. For example, average monthly family share could decrease but overall revenue could increase through expansion in the overall population size. Additionally, average tenant share allows for an “apples-to-apples” comparison across participating households in voucher and public housing programs. We will use a benchmark of 50% of the Plan Year 2-bedroom payment standard.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: In late 2018, THA began tracking the number of households enrolled in an educational and/or job training program for this population. This information is collected during annual recertifications. THA is on a biennial recertification schedule and has not collected sufficient data to report outcomes. THA will report on these metrics in 2023 – two years after implementing the requirement to collect this data.

7. Local Income and Asset Policies (HCV/PH)

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: As part of this activity THA implemented the following policies:

- Allow tenants to self-certify assets valued at less than \$25,000.
- Disregard income from assets valued at less than \$25,000.
- Eliminate earned income disallowance (EID).
- Exclude resident stipends up to \$500.
- Accept hand-carried third-party verifications and increase number of days verifications are valid up to 180 days.
- Extend the authorization of the HUD 9886 form.
- Accept hand carried verifications.

Impact: These changes have allowed THA to further streamline inefficient processes and save staff time while reducing the burden on clients to provide information that made little difference in rent calculation.

Update: Staff time interviews have shown that on average it takes twenty minutes to verify assets greater than \$25,000, but in 2020 there were only five (5) households with reported assets over \$25,000. THA has seen nearly a 100% savings from only verifying assets over \$25,000.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease) as shown by hourly staff cost applied to hours required to perform task.	\$19,726	\$10,400	\$46	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	967 hours	500 hours	2 hours	Met

Hardships: No hardships were requested for this activity in 2020.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020

Actual Changes to Metrics/Data Collection: No changes to metrics or data collection for this activity in 2020.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

8. Local Interim Processing and Verification Policies (HCV/PH)

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: The purpose of this activity is to streamline the interim review process. THA found that parts of its interim policy were causing more work than necessary. Because of that, THA will no longer require an interim increase for every income increase reported and will process interim decreases when the income loss is 20% or more. THA will also limit interims to two per recertification cycle. In 2013, a process improvement project led to THA accepting all interims online. The activity has worked well with THA providing supports to clients who cannot use a computer and need assistance.

Impact: THA spends significantly less time processing rent change interims due to income changes. Additionally, households with income-based rental assistance get to keep gains from income increases until their next annual recertification.

Update: In 2020, THA received approximately 338 change of circumstance requests that pertain to changes in household income. Of those, THA processed 141 interims that were due to a notable decrease in the family's income. Of the 388 report changes of income almost half were due to income increases. THA also relaxed its hardship requirements for households impacted by the COVID-19 pandemic.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	\$11,409 (2016)	\$9,864	\$3,138 in staffing costs to process rent decreases	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease) to complete interims that result in rent changes.	347 hours (2016)	300 hours	113 hours	Met

Hardships: THA processed 33 COVID-19-related extensions for households with time-limited subsidies in 2020.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: In 2017, THA made a minor change to its methodology to determine metric outcomes. Previously, THA included all interim processing-related activities while calculating these metrics, including FSS interims and inspections. To better report on the intended outcomes of this activity, THA now limits interims included in its calculations to interims that resulted in an actual change in rent.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

11. Simplified Utility Allowance

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: This activity streamlined the utility allowance (UA) given to THA's clients and residents. Historically, THA's utility allowances varied by building type, bedroom size, and type of fuel/energy used. These variables resulted in numerous possible utility allowance combinations that were difficult to explain to property owners and clients, and often resulted in methodological misunderstandings. The new UA schedule was streamlined by eliminating the structure and energy type differentiators.

Impact: This activity has had a positive impact on both staff and residents. It has simplified explanation of the UA and reduced the amount of time staff uses to process the UAs. THA staff still checks the accuracy of UAs although rent calculations and utility allowances are now automated in THA's "Open Door" software system.

Update: No update to this activity in 2020.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	\$6,793	\$3,397	\$858 in staff cost to process UAs	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	333 hours	167 hours	31 hours	Met

Hardships: No households requested hardships due to this activity in 2020.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes in 2020.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity. However, it should be noted that the outcomes are derivatives from Activities 5 and 6 as it is part of the annual recertification process and it should not be interpreted as hours and costs in addition to those processes.

12. Local Port Out Policy

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2012.

Description: This activity intends to reduce the number of invaluable housing dollars leaving Tacoma and the burden of administering port out vouchers while preserving portability in enumerate cases where it would advance important program goals. For these reasons, THA has limited the reasons a household may port-out. THA voucher holders are eligible to port-out when: their circumstances through an approved Reasonable Accommodation requires so; situations covered under the Violence Against Women Act (VAWA) and educational/employment circumstances. Households may also port-out when the receiving housing authority will absorb the voucher.

Impact: The activity has been successful in reducing the total number of port outs each year. Prior to implementation in 2011, THA saw 325 households port-out of its jurisdiction. Since then, THA sees around half the number of households porting-out.

Update: In 2020, 86 clients ported out of THA's jurisdiction with a total of 194 households in billing status. This is a 131 household decrease from the baseline of 325 households prior to implementation of this activity in 2011. The majority of port-out requests were due to emergency transfers and reasonable accommodations which is why most port-out requests were approved. For this reason, THA did not meet its benchmark.

CE # 1 (a): Agency Cost Savings – Staff Costs				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	\$5,556	\$2,222 (60% decrease)	\$4,151	No, most of the port-out requests received in 2020 were eligible to port under this activity's criteria.

CE # 1 (b): Agency Cost Savings – Port Out Administrative Billing				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	TBD	TBD	\$126,859	THA will establish a benchmark for this new metric in 2021.

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	200 hours	80 hours (60% decrease)	181 hours	Not met, but most port out requests received in 2020 were approved.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes made to metrics/data collection in 2020.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

15. Regional Approach to Special Purpose Housing

Plan Year Approved, Implemented, Amended: THA received authorization for this activity in 2012. THA used this activity to implement its local, non-traditional housing programs in 2013.

Description: THA is using this activity to add funds to the existing local infrastructure that provides housing assistance and services to families and young adults experiencing homelessness within the Tacoma/Pierce County area. Pierce County's Coordinated Entry system is the central intake for all individuals and families in Tacoma/Pierce county seeking assistance to exit homelessness. Households coming through central intake are assessed for the appropriate housing intervention and case management care needed to exit homelessness. Under this activity, THA pools resources with Pierce County to serve households without housing, or at serious risk of losing their housing and provide the supportive services needed to stabilize the household. THA's investment in Pierce County's Coordinated Entry system is mostly used to assist households receiving services through Rapid Rehousing.

Expanding on this partnership, in late 2020, THA, Tacoma Public Schools (TPS), and Pierce County launched the Tacoma Schools Housing Assistance Program (TSHAP). TPS families identified as McKinney-Vento. Families are referred to the contracted provider who engages them in a creative conversation to identify their needs and potential solutions to their housing challenges. Potential interventions include one-time prevention supports, diversion, or Rapid Rehousing, depending on a family's particular needs.

For households being served through TSHAP and Rapid Rehousing, THA will continue to count households assisted under this activity as "served" six months post participation. THA's partners report that THA funded service providers may still provide case management to households up to six months post program participation. Households are allotted a six-month period, similar to the "hold" voucher holders are permitted after being notified of a pending End of Participation (EOP). This provides a safety net for households who may still need support after their housing assistance has ended. This allows families to receive the services they need without requiring them to re-enter the Coordinated Entry system.

THA also uses the flexibility granted under this activity to designate one of its public housing scattered units as shelter to homeless and unaccompanied youth in Tacoma and Pierce County.

Impact: Traditional waitlists are unable to address immediate housing needs and barriers, but through this investment THA can serve families when they need housing the most. Each year since its implementation THA has been able to serve hundreds of families and young adults who needed an immediate housing intervention to transition them from unstable to stable housing. THA has been able to leverage County resources including case management services that strengthen a family's ability to remain stably housed. TSHAP helps Tacoma Public Schools (TPS) students

experiencing homelessness and their families become stably housed with the intent to reduce returns to homelessness and stabilize or improve academic outcomes.

Update: At the end of the year, THA's Rapid Rehousing investment reached 276 households who were experiencing homelessness in Tacoma/Pierce County in 2020. By the end of 2020, 19% of Rapid Rehousing households experienced a median increase of \$1,500 in their earned wages while 24% of Rapid Rehousing households experienced a median change of \$1,030 in their overall income. Of households who exited projects to permanent housing over the past two years most remained housed – 93% of households did not return to homelessness within 24 months.

TSHAP launched in the late fall and so far, has provided 11 households with housing and supportive service assistance. Three were one-time payments for households needing preventative or diversion assistance and 50 households received Rapid Rehousing services which helped them exit shelters or the streets into private housing.

CE # 4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increased).	\$0	\$150,000	TSHAP (for period 3/2020 – 12/31/2021): \$400,000 for housing and supportive services from Pierce County; \$356,461 for supportive services from THA philanthropic funds; \$35,646 for administration from Pierce County;	Met

			\$125,000 for THA program oversight from Tacoma Public Schools	
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SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0 households	120 households	11 unique TSHAP families and 276 unique RRH households housed in 2020.	Met

SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0 households	20 households	Exited or graduated with <=50% market rent burden: 4 families (7% of all RRH exits in 2020)	Not Met

HC #1: Additional units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0 households	120 households	11 unique TSHAP families and 276 unique RRH households housed in 2020.	Met

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	120 households	11 unique TSHAP families and 276 unique RRH households housed in 2020.	Met

Actual Non-Significant Changes: No changes or modifications were made to the MTW activity in 2020.

Actual Changes to Metrics/Data Collection: Pierce County and THA amended the contract to include more client details in Pierce County's submission to THA. This can allow for more targeted reporting and analysis for future metrics.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

16. Creation and Preservation of Affordable Housing

Plan Year Approved, Implemented, Amended: THA proposed this activity in a 2012 plan amendment intended to preserve and create affordable housing units utilizing MTW authority. THA used MTW dollars in 2013 on the development of affordable housing units to replace Hillside Terrace.

Description: The flexibility granted through this activity allows THA to acquire or develop affordable housing to households at or below 80% of AMI within the City of Tacoma. THA intends to allow eligible low-income families to reside in these units, including those that may be receiving HCV rental assistance. This activity allows THA to preserve an affordable housing stock within Tacoma, especially in areas where rents are quickly becoming unaffordable. THA also recognizes that this entire activity is under the parameters of PIH Notice 2011-45 and will abide with the notice when implementing this activity. THA has used this activity to increase the affordable housing stock in Tacoma in the following ways:

Property-Based Subsidies: In 2018, THA re-proposed the activity to utilize its flexibility to place property-based subsidies in up to 500 units. Property-Based Rental Subsidies are contributions to properties that agree to make its units available at a rental price affordable to very low-income households. THA contracts with property owners who agree to these terms and in return THA would make contributions to the property based on a negotiated contract where the tenant contribution plus the subsidy would not exceed the market value of the unit based on a rent comparability study.

Development and acquisition: THA seeks to acquire existing rental housing in neighborhoods where THA doesn't have a strong presence to preserve housing affordability. Acquiring existing rental housing that is affordable to households earning 80% or less of the AMI is one of THA's rental housing preservation strategies. Under this activity THA is able to activate its broader use of funds ability so the agency could spend MTW dollars on construction and acquisition of affordable housing units. THA is using its MTW dollars to develop and/or acquire the following projects:

(1) *Housing Hilltop* – THA purchased 4 parcels in the surrounding Hilltop neighborhood. THA will develop a series of multi-family, mixed-use buildings which will serve as a catalyst for high quality residential and commercial development that will encourage increasing private investment in the area, while ensuring that affordable commercial and retail spaces are available. This will all be part of the Housing Hilltop plan.

(2) *1800 Hillside Terrace* – MTW funds were used to develop Bay Terrace, formerly Hillside Terrace. Phase I and II are completed and fully on-line. The development provides 74 newly constructed affordable housing units. The majority of the units are subsidized with project-based vouchers while 22 of the units are unsubsidized but remain affordable.

(3) *James Center North* – THA acquired a 7-acre retail and commercial area that poses a good transit-oriented development opportunity. It is also directly across the street from the Tacoma Community College and close to transit, shopping, and entertainment. THA intends to develop an attractive, mixed-use development that will include apartments for people with a variety of incomes in amenity-rich West Tacoma.

(4) *Arlington Drive Youth Campus* - THA has partnered with Community Youth Services (CYS) and the YMCA of Greater Seattle to develop a service-enriched campus providing homeless, unaccompanied youth and young adults with short and long-term housing and high quality, engaging, empowering and supportive services. These services will include professional trauma-informed case management, independent living skills training, family reconciliation, therapy, substance use counseling, and job training. The campus will include the following elements:

- A Crisis Residential Center (CRC)/HOPE facility for homeless youth aged 12 to 17 years, with 12 beds allowing young people to stay an average of 15-30 days, depending on need. The CRC/HOPE facility offers youth a safe, supervised, and nurturing place to stay while skilled case managers work to arrange a safe place to live. This may be back with family, to relatives, to a new family, or to foster care. CYS's current six-bed CRC in Tacoma, WA has a 91% rate of successful discharge to a safe new residence. We anticipate that the CRC at Arlington Drive will serve 300-400 Pierce County youth and young adults every year.
- 58 units of rental housing for young adults ages 18 to 25 years, with focused support services provided by the YMCA of Greater Seattle to address their behavioral, mental and physical health needs and to help them complete their education, learn necessary life skills, and establish careers so that they enter into adulthood with the support and resources necessary to live a safe, healthy and thriving life. The YMCA of Greater Seattle is the largest housing provider for homeless young adults in the Pacific Northwest, and one of the nation's premier social service agencies focusing on young adults.
- High quality supportive services that emphasize social community activities, diversity, equity, and social enterprise.

(4) *Intergenerational Housing* – THA is exploring an intergenerational housing project that will serve a multigenerational community where children who have experienced trauma can receive love and care from kinship

and adoptive parents and live in a community with seniors who by living there agree to be respite caregivers, honorary grandparents and tutors to the families.

Impact: Through its Property-Based Subsidies (PBS) program, THA has contracted with market-rate properties to preserve and/or create affordable housing options for very low-income households in Tacoma. This allows THA to serve low-income households in other non-traditional ways outside of tenant-based or project-based subsidies. Over the past year, two assisted living facilities serving Medicaid Seniors in Pierce County closed down and 140 low-income seniors were displaced. By offering property-based subsidies, THA assisted in preserving the only two remaining facilities in Pierce County that provide memory care for Medicaid patients. Neither facility could have continued to do that without THA's rental subsidy. The PBS program has been a meaningful addition to THA's CHAP (see Activity 17 – HOP) program. THA has partnered with five properties near the University of Washington – Tacoma and Tacoma Community College to house homeless or near-homeless students. This has been valuable as CHAP voucher holders have struggled to secure private rentals in Tacoma's competitive rental market.

Update: In 2020, THA executed a PBS contract with the Metropolitan Development Council (MDC) for the 10 units they operate at Campbell Court Apartments. This property serves mentally disabled adults exiting homelessness from the streets or shelters. Another PBS contract went into effect this year at Koz on Puyallup for 75 units to house homeless or near homeless students from the University of Washington – Tacoma.

To date, THA has partnered with seven different properties and has secured 344 affordable housing units. Two of the properties provide housing and services to Medicaid eligible seniors in need of dementia care, one for adults with intellectual disabilities exiting homelessness and the remaining are dedicated for students experiencing homelessness enrolled at Tacoma Community College or the University of Washington-Tacoma.

Housing Hilltop: In 2020, THA entered into an AHAP with Horizon Housing Alliance to provide 57 project-based vouchers for permanent supportive housing for homeless single adults. The property will provide on-site case management and support services.

The 1800 Hillside Terrace: Phase III, which will be known as The Rise on 19th, was completed in late 2020. THA also converted 11 of the PBV units to HUD-VASH PBV to address the HUD-VASH voucher challenges and the growing homeless population in Tacoma. THA began leasing for The Rise at 19th in late fall and will continue getting the building fully leased throughout the beginning of 2021.

James Center North: Working closely with local partners, THA completed the Hilltop Master Planning and is coordinating with potential development partners to contract the buildings.

Arlington Drive Youth Campus: This project was completed in 2020 and opened its doors in late 2020. THA began the lease-up process that will continue into early 2021.

HC #1: Additional units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase) in 2020.	0 units	200 units	Campbell Court – 10 units Koz on Puyallup – 64 units	Not Met

HC #2: Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase)	0 units	62 units	Highland Flats – 62 units Crosspointe – 20 units Cascade Park Vista – 75 units Cascade Park Gardens – 70 units Koz on Market – 52 units Koz on Puyallup – 64 units MDC Campbell Court – 10 units Bay Terrace – 26 units	Met

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	62 households	Highland Flats – 20 households Crosspointe – 4 households Cascade Park Vista – 12 households Cascade Park Gardens – 34 households Koz on Market – 9 households Koz on Puyallup – 64 households Campbell Court – 10 households	Met

Actual Non-Significant Changes: No non-significant changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection process.

Actual Significant Changes: No significant changes in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

17. Housing Opportunity Program (HOP)

Plan Year Approved, Implemented, Amended: THA proposed and implemented this program in 2013 after receiving MTW approval. The activity was re-proposed in 2014 with updated program requirements.

Description: All new admissions to THA's tenant-based voucher program receive a HOP subsidy. A HOP subsidy is a fixed subsidy as opposed to a subsidy based on income. The fixed subsidy is determined by the household size at admission and 50% of the current payment standard. This is applicable for both elderly/disabled households and work-able households. However, work-able households are subject to five-year term limits; whereas, elderly/disabled households may receive assistance indefinitely. The goal of the program is to help our participants achieve self-sufficiency by assisting them with their housing needs for a specific term and to give other waiting households a turn to receive assistance.

Through the use of targeted funding, THA also provides a limited number of HOP subsidies to two programs: the College Housing Assistance Program (CHAP) and the Children's Housing Opportunity Program (CHOP).

CHAP: THA partners with the Tacoma Community College (TCC) to provide rental assistance to TCC's population of homeless and near homeless students. TCC provides services designed to help the families succeed so they are ready to be independent of housing subsidies after graduation. The program offers the same fixed subsidy as the HOP program and has a five (5) year limit on assistance. Graduates are considered a success and are transitioned off of the program with up to twelve (12) months of additional assistance to serve as an income-building year, not to exceed the five (5) year limit. The community college handles all eligibility but participants must be an active student at the community college and/or transferring to University of Washington, Tacoma. Students must stay in college and make satisfactory academic progress towards a degree or certificate.

CHOP: THA partnered with the Department of Children, Youth and Families (DCYF) to provide rental assistance to families who need housing to prevent or shorten their child's foster care placement or to house a teenager aging out of foster care who otherwise would begin his or her adulthood in homelessness. To date, CHOP has helped 33 families stay together or re-unite sooner.

Impact:

HOP: Upon their last year receiving assistance, each cohort has experienced meaningful increases in their earned income while in the program. Similar trends can be observed for current work-able HOP households still receiving HOP rental assistance. Yet, Tacoma rents are rising quickly, vacancy rates are falling and wages are not keeping up. More and more people need help paying the rent. Tacoma's rental market requires a full-time hourly wage of \$26.68 to afford a modest two-bedroom apartment. In contrast, Washington's minimum wage is \$12.50 (FY 2020 hourly rates).

Wages have not kept up with Tacoma's rental market – meaning many households exiting HOP will struggle paying their rent without a subsidy. However, the fixed subsidy has made it possible for THA to serve 20% more households than it could serve if the agency maintained an income-based subsidy. THA has been able to provide HOP assistance to nearly 800 low-income households in Tacoma since 2013. HOP has also made our voucher programs easier to understand, administer and serve more households quicker.

CHAP has seen mixed results. 75 households were housed through a CHAP voucher thus providing the household stability while on program. However, like HOP, the shallow subsidy doesn't bolster CHAP household's income enough to afford housing in the private market. CHAP households are within the 30% AMI range, so even with a voucher, their income is insufficient to secure housing. A recent evaluation found that only one-quarter of CHAP participants lease-up and those that do tended to show stronger pre-existing navigational and academic skills. These findings are being used to explore how the program can be modified to increase lease up success and attain more equitable outcomes. While THA explores how to strengthen CHAP, 67 households secured housing and 4 students graduated this year.

CHOP continues to serve families involved in the family courts system in partnership with the Department of Children, Youth and Families by providing housing stability through CHOP assistance and supportive services provided by service partners.

Update:

ALL HOP: In 2020, THA suspended time limits for all time-limited programs until the end of 2021 which allowed 70 households to remain on program longer than originally allowed. At the end of 2020, 477 households were receiving assistance through HOP. Of these households, 202 (42%) were considered work-able and 275 (58%) were elderly and/or disabled households. 67 households were receiving assistance through CHAP and 16 households were enrolled in CHOP.

Across all cohorts and HOP programs, 28 households exited in 2020. Of those, 8 (29%) exited with a shelter burden at/or less than 50%. While most work-able HOP households will experience income gains throughout their time in the program many will still exit into an unaffordable housing market. THA is evaluating the efficacy of time-limits on income progression.

Although THA did not issue HOP vouchers for new admissions, for those moving with a HOP voucher, clients experienced a decrease in shopping time from 61 days (2019) to 42 days (2020); and THA observed a slight decrease in the number of unused/expired vouchers from 22% (2019) to 20% in 2020. These are positive changes but the COVID-19 pandemic has hit families hard and has no real end in sight. THA will continue to monitor these trends and modify the program accordingly.

Fifth-year HOP work-able cohort: This year, the 2015 work-able cohort reached their five-year end mark. Normally, this cohort would have exited the program after reaching the five-year time limit but THA has suspended time limits for all time-limited programs. These terms limits have been extended until the end of 2021. However, similar upward trends exist among this cohort as with past HOP graduates. The 2015 HOP cohort started with 36 work-able households with average wages of \$4,833. This year, 23 households remain and ended the year with average earnings of \$22,461.

CHAP: 4 students exited the program in 2020. While the addition of new PBS units is reported under Activity 16, those new units are a positive gain for the CHAP program as CHAP students have first priority for the PBS units. This allows us to serve CHAP students with either a HOP voucher or subsidized units affordable for low-income students.

CHOP: At the end of 2020, 16 families were receiving housing and supportive services through CHOP. For CHOP-eligible families that are also participating in Family Recovery Court, they will receive priority when referred to THA for CHOP assistance.

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase). Work-able HOP households.	\$12,164 (2013)	All HOP Work-able: \$20,670 CHOP: \$20,670 CHAP: \$20,670	HOP All Work-able: \$17,868 5 th -year Work-able: \$22,461(2015 co-hort) CHOP: \$11,132 CHAP: \$9,489	HOP All Work-able: Not met 2015 HOP work-able cohort: Met CHOP: Not met CHAP: Not met

SS #3: Increase in Positive Outcomes in Employment Status (work-able HOP households only)				
Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
1) Employed Full Time	0 households	143 households	110 households	Not Met
	0%	50%	39%	Not met

2) Employed Part Time	0 households	128 households	71 households	Not Met
	0%	45%	25%	Not Met
3) Enrolled in an Educational Program	0 households	TBD	67 CHAP households	THA will establish benchmark in 2021
	0%	TBD	NA	NA
4) Enrolled in a Job Training Program	0 households	TBD	NA	THA will establish benchmark in 2021
	0%	TBD	NA	NA
5) Unemployed	0 households	14	104	Not met
	0%	5%	36%	Not met

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF (decrease).	15% (9) work-able HOP households from 2013 cohort	10% of year 5 work-able HOP households	Year 5 work-able HOP households: 4 receiving TANF (17% of work-able HOP households from 2015 cohort)	Not Met

SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase). Households participating in FSS.	0 households	15% participation in FSS by HOP work-able households	33 HOP households participated in FSS (16.3% of work-able HOP households)	Met

CE#6: Reducing per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	\$604 average monthly HAP for traditional HCV	\$708 average monthly HAP for HOP households (50% of 2-BD payment standard)	\$554 average monthly HAP for HOP-Elderly/Disabled households; \$680 for HOP work-able households	Met

SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). Work-able households who exit HOP with a market rent burden less than or equal to 50%.	Exited with market rent burden <=50%: NA Average market rent burden (all HOP): 72% Average market rent burden (HOP 2013 cohort): 71%	50% of exiting work-able households will have market rent burden <=50%	Exited with market rent burden <=50%: 8 families (29%) Average market rent burden (all HOP): 80% Average market rent burden (HOP 2015 cohort): 56%	Not met.

HC #3: Decrease in Wait List Time				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	5.16 Years	2 Years	THA did not issue new HOP vouchers in 2020.	N/A

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of calculating rent in dollars (decrease). Estimated staff cost to conduct annual reviews.	\$59,127 (cost to complete the same # of traditional annual recertification)	\$29,563 (decrease by 50% of baseline)	\$10,102 estimated staff cost to conduct HOP reviews in 2020.	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to calculate rent in staff hours (decrease). Staff time to conduct annual reviews.	1,572 hours (time to complete the same # of traditional annual recertification)	786 hours (50% of baseline)	364 staff hours spent conducting HOP reviews in 2020	Met

CE # 4: Increase in Resources Leveraged (From the College Housing Assistance Program)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increased).	\$0	\$22,000	Tacoma Community College: \$75,000 for security deposit assistance; \$80,000 for CHAP-dedicated staff. Kresge Foundation: \$500,000 to support CHAP – subsidies, data, evaluation, landlord mitigation funds and operating funds.	Met

			<p>ECMC Foundation: \$10,000 landlord mitigation/operating funds</p> <p>Rapoport Foundation \$65,000 for CHAP-DOC</p> <p>Foundation for Tacoma Students \$50,000 support for CHAP project manager</p>	
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Hardships: 33 HOP households received a hardship extension under COVID-19 waivers. One (1) household received a hardship extension as an active participant in a self-sufficiency program.

HOP's extension/hardship policy may grant up to one year of additional rental assistance to households actively enrolled in a self-sufficiency activity that will likely increase the household's earned income (activities may include a degree program, FSS, or vocational certificate). To be eligible, a household must also be extremely rent-burdened (>50%) and without rental assistance (according to the payment standard). THA also provides a 90-day unexpected loss of income hardship extension for households who experience an unforeseen loss of income within 90 days prior to exit.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: THA made changes to baselines and benchmarks in 2017. The methodology established in the 2017 report has not changed, but variables will change over time, metrics that have evolving benchmark are as follows:

SS#1: Increase in Household Income – The benchmark is based on Washington's minimum wage and an assumption of a 30 hour work week. The benchmark will be revised in subsequent MTW reports as minimum wage changes.

SS#3: Increase In Positive Outcomes in Employment Status - THA has established new benchmarks for full, part, and unemployed participants. Because the size of this population fluctuates from year-to-year, a percentage-based benchmark will be applied annually to the number of households in order to establish numerical benchmarks.

CE#1 & CE#2: Agency Time and Cost Savings - THA used the results of a time study of administrative tasks (completed in early 2018) to update the time and estimated staff costs to conduct HOP annual reviews. In previous MTW reports, THA has indicated these metrics reflect staff time and costs related to the rent calculation. To clarify the task being measured, THA will define this calculation more broadly to include the entire annual review process. The estimated staff cost to conduct reviews was based on the annual staff hours required and the average hourly salary (plus benefits) of the staff engaged in the review process.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: Challenges achieving benchmarks are related to income which may indicate that THA may need to re-evaluate its benchmarks. Households must be very low-income at admission and the specialized HOP programs target households that are experiencing homelessness. Even for households that see significant income increases by the fifth year just barely make an annual income based on Washington State's minimum wage. THA has emphasized its education projects because of the value it brings to upward mobility. However, meaningful gains in a short period of time are difficult to achieve. An evaluation of THA's HOP and CHAP programs are in progress which will inform any changes to program design.

18. Eliminate the 40% Rule

Plan Year Approved, Implemented, Amended: THA proposed and implemented this program in 2013 after receiving MTW approval.

Description: THA used this activity to waive the 40% cap on the percentage of income spent on rent. The goal is to allow for maximum resident choice in the voucher program and to substantially increase the participant's ability to understand the program and lease up more quickly.

Impact: This activity has allowed more households in THA's voucher programs to lease units that they would have not had the opportunity to lease in the past. In addition, staff have saved time explaining the 40% rule to clients.

Update: In 2020, 501 (21%) MTW households used this flexibility to stay in a unit that exceeded the 40% rule; or move into a unit that exceeded the 40% rule. Eliminating the 40% rule removed the additional burden of finding housing in a tightening market. Families are not additionally burdened by the 40% rule when looking for housing in an already competitive market. However, when a household selects a unit where the contract rent exceeds the payment standard they are subject to larger out-of-pocket expenses. With this in mind, THA is likely to propose increasing the payment standards to help THA voucher holders lease-up successfully and stay in their units.

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	100 households	501 households leased a unit when rent exceeded 40% of their income	Met

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection process.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

19. Modify the FSS Program

Plan Year Approved, Implemented, Amended: THA proposed and implemented this program in 2013 after receiving MTW approval.

Description: Through its MTW flexibility THA modified the way we calculate escrow payments to be simpler and provide clear motivation and guidelines for participating families. We designed a method under which families may qualify for one or more pay points based on pre-determined goals and accomplishments. These pay points are calculated and credited at the end of the FSS contract term. Pay points are based on self-sufficiency activities such as earning a degree or maintaining full-time employment for more than 6 consecutive months.

Impact: Clients have reported the escrow is motivating and easier to understand. THA has also seen staff time saved, and the time is now being spent on direct service.

Update: In 2020, FSS served 162 families. 11 families graduated from the FSS program with an average escrow amount of \$7,293. This is an increase of \$888 in escrow funds from 2019. Four of the 11 graduates purchased homes, utilizing escrow funds for down payments, relocation costs and furnishing their new homes. Five clients requested contract extension as a result of COVID-19. These clients saw a reduction in their hours at work, or inability to finish educational programs. In 2020, FSS participants continued their work with the embedded financial coach. During 2020, 18 participants saw an average increase in their credit score by 43 points. 20 participants grew their net worth by an average of \$9,144. Four of these participants went from a negative or zero net worth.

CE # 1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease) by not having escrow errors.	\$22,586	\$1,583	\$0	Met

CE # 2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours	936 hours	78 hours	0 hours	Met

(decrease) by not having escrow errors.				
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SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$9,231	\$21,060	\$20,839	Met

SS #2: Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	\$0	\$500	\$1,642 (increase from last year) with an average growth of \$802 from beginning balance	Met

SS #3: Increase in Positive Outcomes in Employment Status				
Report the Baseline, Benchmark and outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
1) Employed Full Time	87 households	57 households	81 households	Met
	54%	35%	50%	Met
2) Employed Part Time	29 households	65 households	28 households	Not met
	18%	40%	17%	Not met
			N/A	Not met

3) Enrolled in an Educational Program	13%	25%	21%	Not met
4) Enrolled in a Job Training Program			N/A	Not met
	23%	20%	8%	Not met
5) Unemployed	42 households	8 households	53 households	Not met
	26%	5%	33%	Not met

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	19 participants	5% of FSS participants on TANF	15 participants or 9% of FSS participants on TANF	Not met

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

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	140 FSS participants	100% of FSS participants	188 FSS participants	Met

SS #6: Reducing per Unit Subsidy Costs for Participating Households

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	\$589 (2014)	\$704 (50% of 2-BD payment standard)	\$675	Met

SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total Household contribution towards housing assistance (increase). Average monthly tenant share.	THA cannot establish a baseline for this metric.	\$704 (50% of 2-BD payment standard)	\$509 average monthly tenant share for FSS families	Not Met

SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	Exited or graduated FSS with market rent burden <=50%: NA	50% of exiting or graduating work-able households will have market rent burden <=50%	Exited or graduated FSS with market rent burden <=50%: 80% (4 families) of FSS EOPs in 2020	Met
Percentage of FSS graduates with market rent burden less than 50%.	Average market rent burden (all FSS): NA		Average market rent burden (all FSS): 73%	

Actual Non-Significant Changes: No changes or modifications were made to the MTW activity in 2020.

Actual Changes to Metrics/Data Collection: THA made changes to baselines and benchmarks in 2017. The methodology established in the 2017 report has not changed, but variables will change over time, metrics that have evolving benchmark are as follows:

SS#1: Increase in Household Income – the benchmark is based on Washington's minimum wage and an assumption of a 30-hour work week. The benchmark will be revised in subsequent MTW reports as minimum wage changes.

SS#3: Increase In Positive Outcomes in Employment Status - THA has established new benchmarks for full, part, and unemployed participants. Because the size of this population fluctuates from year-to-year, a percentage-based benchmark will be applied to the number of households each year in order to establish numerical benchmarks.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There have been challenges achieving the prescribed benchmarks, but FSS participants have displayed an increase in household income, educational and employment participation from the previous year.

21. Children's Matched Savings Accounts

Plan Year Approved, Implemented, Amended: THA proposed this activity in its 2014 MTW Plan and implemented the program in Fall 2015.

Description THA offers children's savings accounts (CSAs) from kindergarten through high school to the children of New Salishan. The program helps the children of Salishan and their families aspire to college, prepare for it and pay for it. It also seeks to help participants and their families develop a savings habit and improve academic achievement, graduation rates, college preparation and enrollment. New Salishan is THA's largest community.

Impact: Since its launch, CSA participants have yet to reach 12th grade, therefore high school graduation data is not yet available. However, since its launch, the program has enrolled 205 students, brought financial education to 1,346 students and has managed to partner with the state's 529 program to expand college-savings capabilities to low-income families.

Update: In 2020, THA's CSA program enrollment remained opened for eligible families, however program engagement and activities were significantly impacted by COVID-19. CSA program staff pivoted to respond to the urgent needs of families as the pandemic impacted student life and wellbeing. Staff quickly worked with community partners to deliver 225 meals per week between June and September 2020, distribute 280 learning kits, and help connect families to free or affordable technology devices and internet services.

In May of 2020, THA Board of Commissioners approved a partnership with the Washington Student Achievement Council (WSAC) to integrate the CSA program with the state's 529 Guaranteed Education Tuition (GET) program. The (GET) Program is Washington's 529 Prepaid Tuition Plan. GET is a great way for families to save for future education expenses and watch their savings grow tax-free and remain tax-free when it's used for qualified expenses at schools and colleges nationwide and abroad. This change means families will have an easier time interacting with their account through an online portal and are connected to the state's tools and resources for navigating college and career pathways as well as financial aid.

The program has \$96,827 total in savings across seed, match and incentive earnings. The average account balance in the elementary seed and match portion is \$197, and \$602 for the scholarly incentive portion for middle and high school participants. THA continued its fundraising efforts for this activity and now has sufficient funding to support all four cohorts.

SS #2: Increase in Household Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy in dollars (increase).	\$0	\$100 average annual savings per account	\$472 average account balance	Met

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection process.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity

22. Exclude Excess Income from Financial Aid for Students

Plan Year Approved, Implemented, Amended: This activity was proposed in the 2014 MTW Plan. This activity was implemented in 2020.

Description: The purpose of the activity is to further encourage self-sufficiency among participants and streamline administrative processes. To achieve this aim, THA modifies the administration of the full-time student deduction by excluding 100 percent of a student's financial aid. THA does this for its tenant-based voucher programs and for THA residents living within THA's portfolio. THA excludes excess income from student financial aid from the income calculation used to determine initial eligibility into THA programs and for a household's calculated income for re-certifications and interims.

Impact: THA has not yet observed the impacts of this activity. However, THA anticipates that this activity will help increase a household's disposable income and encourage the head of household to finish their degrees.

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmarks Achieved?
SS#3 Number of households enrolled in an educational program (receiving financial aid)	192 households (2014)	202 households	TBD	TBD
SS#3 Number of households enrolled in an educational program (receiving financial aid) as a %	0%	5% (increase from baseline)	TBD	TBD

Update: THA has updated its processes and internal data collection and began collecting this information throughout 2020. THA has biennial and triennial recertification cycles and will see the full impact of this activity after one full recertification cycle. THA cannot report on outcomes for 2020.

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection process.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020 through an Annual MTW Plan amendment.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

24. Rental Assistance Success Initiative (formerly Local Security and Utility Deposit Program)

Plan Year Approved, Implemented, Amended: THA proposed this activity in its 2014 MTW Plan and implemented the program in January 2016. Minor amendment in 2019.

Description: Initially this activity was solely a security deposit assistance program that was open to THA applicants in its Tacoma Public Schools Special Housing Project, its College Housing Assistance Program, and any of THA's affordable housing applicants/residents who needed assistance in order to move into a unit. THA realized that many households did not have the resources to pay the security deposit once they reached the top of the waitlist and were offered a unit. This program ensured that families in need could afford to move into the unit when their name is called. It would also reduce the number of unit turndowns THA receives. For those moving into THA properties, in order to receive assistance through the Security Deposit Assistance Program (SDAP), the household must be at/or below 30% AMI.

In addition to SDAP, THA modified the program in its 2019 Plan to expand the flexibility within this activity to include potential incentive programs to encourage property owner participation in THA's rental assistance programs.

THA plans to use its MTW authority to implement additional programs and activities that will lead to increased participation in the MTW program and the utilization of this highly valued housing assistance. THA has focused on developing strategic relationships with landlords to strengthen relationships and has created a new position, Landlord Engagement Specialist, to lead this work.

Currently, THA's primary focus is to help tenants be more competitive on the private market by providing Renter Readiness classes.

THA's Landlord Engagement Specialist developed partnerships with local service providers to offer Renter Readiness classes to voucher holders who are shopping for a home. Through this initiative THA has established a Landlord Advisory Group which meets monthly. These meetings maintain a healthy attendance of landlords.

Impact: THA became a member with Washington Multifamily Housing Association (WMFHA), Pierce County Chapter of National Association of Residential Property Managers (NARPM), Rental Housing Association of Washington (RHAWA), and the Washington Landlord Association (WLA). The benefit has been tremendous. THA has a strong relationship with the lobbyists from each organization, and they serve on our Landlord Advisory Group.

The Landlord Advisory Group Consists of lobbyists for NARPM, RHAWA, WMFHA, WLA, Corporate Landlords, and a handful of Private Landlords. The group was planning our Annual Landlord Appreciation Event, which was postponed until further notice due to COVID-19. The group is continuing to develop Resident Retention and Landlord Education and advises THA on current issues and policy changes.

Update: In 2020, THA was unable to offer security deposit assistance for voucher holders due to lack of funding. However, THA did continue to house people from the waitlist for vacancies throughout its portfolio. This year, THA assisted 39 households with security deposit assistance averaging around \$406 in assistance with a total of \$15,860.

Since April 2020, 198 community members participated in virtual Renters Readiness Certification classes with 32 of those completing all three classes and getting a certificate. Throughout the COVID-19 pandemic, the Landlord Advisory group quickly became a space to share resources. The group was deeply concerned about the potential for a mass wave of evictions and the economic devastation their tenants were facing. Members were especially concerned about undocumented residents and lack of resources.

The group began sharing Good News Stories during this uncertain time. Many landlord partners set up payment plans and some even reduced the amount of rent owed. Others helped residents purchase items for their businesses. Corporate landlords supported small food truck businesses helping them stay open and keep people employed. Other landlords helped their local communities by offering payment plans; providing referrals to community rental assistance resources, food help, and unemployment application assistance; and partnering with local food banks/services to deliver food to residents in need.

In 2020, THA hosted multiple virtual lunch and learns about the Federal CDC Eviction Moratorium, and the Washington State Eviction Moratorium, which was extended multiple times.

THA focuses on building and strengthening relationships by providing the highest quality customer service to our current and future landlord partners. Members of THA's Landlord Advisory Group started planning a landlord education program that will launch in 2021. The City of Tacoma, Landlord Tenant and Fair Housing Coordinator are involved in the planning process.

THA may use this activity to consider other incentives in the future.

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	20 households	39 households	Met

CE # 4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increased).	\$0	\$50,000	\$0	Not Met

Actual Non-Significant Changes: No changes or modifications to the MTW activity were made in 2020.

Actual Changes to Metrics/Data Collection: No changes were made to the metrics or data collection process.

Actual Significant Changes: No significant changes were made to this MTW activity in 2020.

Challenges in Achieving Benchmarks and Possible Strategies: There are no challenges related to this activity.

25. Modify HQS

Plan Year Approved, Implemented, Amended: THA proposed this activity as an amendment in its 2019 Plan and received HUD approval in 2019.

Description: THA must inspect all units for Housing Quality Standards (HQS) to ensure that federally-assisted units are safe, clean and decent. THA made some modifications to its HQS processes to achieve staff time savings and reduce the time a THA client must wait until they are permitted to move-in. These modifications aim to reduce the administrative burden upon both THA and landlords and to encourage Tacoma housing providers to rent to THA voucher holders. To achieve these goals THA made the following changes:

1. In lieu of re-inspections for a failed HQS initial inspection, landlords may provide evidence that fail items that are outside of THA's prescribed 'life-threatening' category have been cured. THA clients may move into the unit quicker since they no longer have to wait for an additional inspection to be completed. Landlords are still required to cure fail items within 30 days and THA will still conduct annual HQS inspections and audit inspections for quality control.
2. To achieve staff time savings THA will accept a "Certificate of Occupancy" issued by the City of Tacoma in lieu of an initial inspection. Future annual HQS and audit inspections will still be completed to ensure quality control.
3. To further streamline THA's HQS processes – THA will negotiate its own contract rents and determine rent reasonableness. This is broadly applied to all THA owned, managed or subsidized units.

Impact: This activity has allowed THA to streamline its inspection process which allows THA to closely monitor and uphold a high standard for HQS inspections. This enables THA to maintain a well-preserved and attractive portfolio and allows for less delay in the leasing process for developments that are new or have been significantly rehabbed.

Update: In 2020, inspection operations were severely impacted by the pandemic. THA was unable to conduct annual inspections for the majority of the year. We used this activity to save staff time and costs by using a certificate of occupancy in lieu of initial inspections for 58 units at Arlington Drive Youth Campus. Due to the pandemic, THA has not implemented its policy to allow landlords to self-certify for fail minors based on a THA prescribed list of life-threatening items. This project will begin after THA is able to resume normal inspection operations and after we address the inspections backlog. For 2020, THA cannot provide outcomes for the following metrics as the activity has not been fully implemented and inspection activities have been limited due to the pandemic.

CE # 1 (a): Agency Cost Savings – Staff Costs				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Decrease total cost of task measured by staff time (decrease).	Total cost of initial re-inspections in 2018 (TBD) (in dollars)	20% decrease from baseline (in dollars)	N/A	THA significantly reduced its inspection schedule during the COVID-19 pandemic. We cannot provide an analysis at this time.

CE # 1 (b): Agency Cost Savings – Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Decrease total cost of task measured by staff time (decrease).	Average time to conduct initial inspections x number of initial re-inspections	20% decrease from baseline (in hours)	N/A	

Not Yet Implemented Activities

10. Special Program Vouchers

Update: THA proposed this activity in 2011. The initial idea was to establish a program similar to the project-based voucher program. Vouchers were to be awarded to service provider partners for a special purpose or population. The service partners would be responsible for designing the program, including household selection, program guidelines and eligibility criteria, length of time a household would be eligible for a voucher, level of assistance provided to each household, etc. THA would then oversee the administration of these vouchers through an annual reporting and/or audit process. THA has several special programs it is running but they have all been proposed separately as rent reform activities or local non-traditional programs

On Hold Activities

20. MTW Seed Grants

Update: THA implemented this program in 2013 after receiving MTW approval. THA proposed this activity so, if needed, the agency could provide seed grants to service provider partners to increase their capacity to serve THA households. The grants would be specific to helping workable households increase earned income and become self-sufficient. THA used this activity to provide three job skills and soft skills trainings for work-able households in 2013. THA did not have specific goals for this activity in 2020 but would like to keep it in the implemented section of the plan in case an opportunity to leverage a partnership through the use of a seed grant arises.

Closed Out Activities:

2. ESHAP: THA proposed and implemented this activity in 2011 and closed this activity in 2019. The activity began as a pilot program to assist homeless families enrolled at McCarver Elementary School. McCarver was known for its high transient rates. The initial design was intended to stabilize families enrolled at McCarver Elementary and as a result positively impact the high rates of transiency at McCarver. Since its implementation ESHAP has seen changes to its program structure – which included lifting program participation requirements, expanding eligibility for enrolled families to other elementary schools and providing a subsidy similar to THA's traditional HCV model. After evaluation and community consultation, ESHAP will be expanded but also redesigned to function more similarly to the Coordinated Entry model. This will be done in partnership with Pierce County and the Tacoma Public School District. This activity has been closed out and metrics and data regarding future TSHAP families will be reported under Activity 15.

9. Modified Housing Choice Voucher Activity: THA proposed this activity in 2011 and has yet to implement it. The activity proposed to modify the annual inspection process to allow for biennial inspections of qualifying HCV units (instead of yearly). Since HUD guidance was released on inspections allowing any PHA to perform them biennially, this activity was closed out in 2015.

13. Local Blended Subsidy: THA proposed this activity in 2012 but has not implemented it. The activity was created so that THA could create a local blended subsidy (LBS) at existing and, if available, new or rehabilitated units. The LBS program would use a blend of MTW Section 8 and public housing funds to subsidize units reserved for families earning 80 percent or below of area median income. Because of the complicated nature of this activity, THA has not implemented it. THA was approved for a RAD conversion in 2014/2015 which caused this activity to be closed out in 2015. The activity is meant to increase the number of households served and to bring public housing units online.

14. Special Purpose Housing: THA proposed this activity in 2012 and has not implemented it. The activity was meant to utilize public housing units to provide special purpose housing and improve quality of services or features for targeted populations. In partnership with agencies that provide social services, THA would make affordable housing available to households that would not be admitted to traditional public housing units. With this program, THA would sign a lease with partner agencies to use public housing units both for service-enriched transitional/short-term housing and for office space for community activities and service delivery. The ability to designate public housing units for specific purposes and populations allows units to target populations with specific service and housing needs and specific purposes, such as homeless teens and young adults. Because of the RAD conversion, THA closed this activity in 2015.

Section V: Sources and Uses of MTW Funds

Actual Sources and Uses of MTW Funds in the Plan Year
The MTW PHA shall submit unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA), or its successor system.
Actual Use of MTW Single Fund Flexibility
THA used single fund flexibility to fund the Housing Choice Voucher programs in order to carry out the mission of the MTW Demonstration Program through activities that would otherwise be ineligible under sections 8 and 9 of the 1937 Act. Below are listed some of the specific ways in which THA exercises the Single-Fund Flexibility:

- THA is making changes to relieve the administrative burden on both the agency and residents by creating a more streamlined approach to both the certification process and inspections. THA intends its processes to be less intrusive on people with fixed incomes such as the elderly and disabled, and to relieve families from some of the more burdensome requirements of annual certifications. The new certification cycle started in 2013.
- THA is focusing on housing, employment-related services, and other case management activities that will move families towards self-sufficiency. Its Client Support and Empowerment Department also assists tenants that are facing challenges achieving successful tenancy.
- THA is in the midst of making necessary technological enhancements that will benefit the organization and the residents.
- THA is analyzing its administrative overhead and charges expenses directly to the programs whenever possible. The agency is charging administrative or previously allocated costs to a Program Support Center for each of its three activity areas as identified in the Local Asset Management Plan, along with a Community Services central fund to track expenses associated with those functions.
- THA included an activity in its 2012 amended plan that allows the agency to activate the MTW single fund flexibility to support the development and preservation of affordable housing.

- THA is partnering with local agencies to create locally designed, non-traditional housing programs. The programs are funded by THA but administered by community partners.
- THA has developed a property-based subsidy program. Under this model, THA makes an annual contribution of MTW funds. The owner then rents these units to low income households at a rent affordable to these households. THA inspects the units annually and reviews a percent of tenant files annually to ensure the owner is renting to low-income households.

Local Asset Management Plan	
Did the MTW PHA allocate costs within the statute in the Plan Year?	Yes
Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?	No, ongoing
Did the MTW PHA provide a LAMP in the appendix?	Yes, appendix item A
If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.	No actual changes in the Plan Year.

Section VI: Administrative

Reviews, Audits and Inspections

For 2020, many annual inspections and audits were put on hold due to the COVID-19 pandemic. However, the Washington State Audit of THA's Rental Assistance Department was completed virtually and closed with no findings. THA submitted year end reporting to the Washington State Finance Housing Commission (WSHFC) for all properties and all households.

MTW Statutory Requirement

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On behalf of the Tacoma Housing Authority, I certify that the agency has met the three statutory requirements of the MTW program in the fiscal year 2020. This is certification that the Agency has met the three statutory requirements of:

- 1) Assuring that at least 75 percent of the families assisted by the Agency are very low-income 50% AMI and below families. In 2020, 93% of all households were at or below 50% AMI.

Certification of Statutory Compliance 2011			Certification of Statutory Compliance 2020		
Family Size	50% AMI and Below	Above 50% AMI	Family Size	50% AMI and Below	Above 50% AMI
1	98%	2%	1	98%	2%
2	95%	5%	2	90%	10%
3	92%	8%	3	88%	12%
4	93%	7%	4	90%	10%
5	93%	7%	5	89%	11%
6	96%	4%	6	85%	15%
7	97%	3%	7	84%	16%
8+	93%	7%	8+	92%	8%

- 2) Continuing to assist substantially the same total number of eligible low-income families would have been served had the amounts not been combined; and

Program	Public Housing	Section 8	Local Non-Traditional	Totals
Moving to Work Baseline (Updated '13)	817 ⁱ	3,696 ⁱⁱ	0	4,513
2011 Households Served	904	3,448	0	4,335
2012 Households Served	870	3,552	0	4,422
2013 Households Served	762	3,634	47	4,443
2014 Households Served	792	3,673	128	4,593
2015 Households Served	801	3,685	86	4,572
2016 Households Served	801	3,677	61	4,539
2017 Households Served	332	4,049	77	4,458

2018 Households Served	325	3,956	143	4,424
2019 Households Served	243 ⁱⁱⁱ	4,054	467 ^{iv}	4,764
2020 Households Served	4	4,134	506	4,644

- 3) Maintaining a comparable mix of families (by family size) served, as would have been provided had the amounts not been used under the demonstration.

Persons in Household	1	2	3	4	5	6	7+	Total
Pre-MTW	36%	21%	18%	12%	7%	3%	2%	100%
2011	42%	20%	16%	10%	7%	3%	3%	100%
2012	41%	20%	16%	10%	8%	3%	2%	100%
2013	42%	20%	16%	10%	7%	3%	2%	100%
2014	43%	19%	15%	10%	7%	3%	2%	100%
2015	43%	20%	16%	10%	7%	3%	2%	100%
2016	43%	20%	15%	10%	7%	3%	2%	100%
2017	46%	19%	15%	9%	6%	3%	2%	100%
2018	45%	21%	14%	9%	6%	2%	2%	100%
2019	46%	21%	14%	8%	6%	3%	2%	100%
2020	48%	20%	14%	8%	6%	2%	2%	100%

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 M. Mirra

Michael Mirra
Executive Director

ⁱ 104 public housing units were torn down at Bay Terrance in 2013

ⁱⁱ THA received 103 TPV vouchers between July and October 2012

ⁱⁱⁱ November 2019 THA converted 324 public housing units to RAD-PBV

^{iv} In addition to adding 270 local, non-traditional units in 2019, with HUD approval THA includes households receiving services from Pierce County for an additional six months after their assistance has ended.

MTW Energy Performance Contract (EPC) Flexibility Data

This section does not apply.

Additional Appendix Items

Appendix A: Local Asset Management Plan

Appendix B: Rent Burden Methodology

Appendix C: THA's Strategic Objectives

Appendix A: Local Asset Management Plan (LAMP)

A. Background and Introduction

The First Amendment to the Amended and Restated Moving to Work Agreement authorize Tacoma Housing Authority (THA) to design and implement a Local Asset Management Program (LAMP) for its Public Housing Program and describe this program in its Annual MTW Implementation Plan. The term “Public Housing Program” means the operation of properties owned or units in mixed-income communities subsidized under Section 9 of the U.S. Housing Act of 1937, as amended (“1937 Act”) by the Agency that are required by the 1937 Act to be subject to a public housing declaration of trust in favor of HUD. The Agency’s LAMP shall include a description of how it is implementing project-based property management, budgeting, accounting, and financial management and any deviations from HUD’s asset management requirements. Further, the plan describes its cost accounting plan as part of its LAMP, and in doing so it covers the method for accounting for direct and indirect costs for the Section 8 Program as well.

The existing Property Management structure has been in place for several years now. THA has operated using project-based budgeting with on-site administrative and maintenance personnel responsible for the majority of the tasks associated with managing the properties. Our cost approach allocates all indirect revenues and expenses to a Program Support Center (based on unit count) and then charges fees to the programs and properties as appropriate.

B. Guiding Principles

The City of Tacoma established the Tacoma Housing Authority under State of Washington legislation in 1940 through resolution. The resolution states that the City formed the Housing Authority to address a “shortage of safe and sanitary dwelling accommodations in the City of Tacoma, Washington available to persons of low-income at rentals they can afford.” Since then, THA has strived to meet the ever-increasing demands for low-income housing in the Tacoma area. With acceptance into the Moving to Work (MTW) program in 2010, THA took on three additional statutory objectives that further define the Agency’s role on both a local and a national scale. THA is required to keep these objectives in mind through the development of each activity related to MTW, including the development of the LAMP. The three statutory objectives are: 1) reduce cost and achieve greater cost effectiveness in Federal expenditures; 2) give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining

employment and becoming economically self-sufficient; and 3) increase housing choices for low-income families [Section 204(a) of the 1996 Appropriations Act].

C. Description of Asset-Based Operations

Overview of Organizational Structure

THA's Property Management Department is responsible for the day-to-day operations of THA's portfolio and the Administration Department is responsible for Asset Management and compliance. The chart below shows this relationship and the positions responsible for these management functions.



Figure 1: Organizational Structure

Description of 2020 Plan

THA manages its properties as 2 portfolios. We have Portfolio West, which consists of our 456 Renew Tacoma Housing (RTH) RAD units comprised of 9 properties of Elderly/Disabled and Family Housing. Our Hillside properties which comprises 5 properties and 206 units is also under the Portfolio West umbrella. As these properties are more spread out, we have management teams overseeing property groupings as best determined by the Director.

The other management group is called Portfolio East and is responsible for management of our Salishan properties (seven), consisting of 631 units. As Salishan is in one geographical area, there is a centralized management team to manage those properties. We have a Portfolio Manager that oversees our Salishan properties, and a separate one overseeing the reminder of our properties.

Asset and Compliance Management

While the Property Management Department oversees the day-to-day operations of the properties, THA's Asset Management and Compliance Division oversees the long-term strategic objectives of the properties. Having an Asset Management and Compliance Division enables THA to effectively plan for the future, ensure compliance with Local and HUD regulations, and keep the agency's strategic objectives at the forefront when making both operational and strategic decisions. Included within the scope of this division are the following responsibilities:

- Risk Management
- Compliance (file audits, PIC, finding resolution)
- Budget Oversight
- Financial Reporting and Modeling
- Capital Needs Assessment
- Property Performance Review
- Strategic Planning
- Policy Development and Implementation
- Procurement Regulation

Project-Level Reporting

THA instituted project-based budgeting and accounting practices before becoming an MTW agency. Systems and reporting are in place to develop and review onsite management of budgets, expenses, rent collection and receivables, and purchasing. With our current IT system, we are developing more robust reporting to review, analyze and compare property information.

Maintenance Operations

In accordance with HUD Asset Management guidance, THA instituted a decentralized maintenance program in 2008. During 2011, THA realized efficiencies in the maintenance of its Salishan properties by assigning maintenance personnel to the entire Salishan portfolio, rather than each of the individual projects. We continually review our practices and how they are working and update our approach when needed. We have a Facilities Manager position whose responsibility it is to oversee overall maintenance in our properties. We currently have a Maintenance supervisor and four maintenance leads with more technical abilities who assist other maintenance specialists and oversees repairs and work orders in the two portfolios. Each portfolio has a team of maintenance specialists that perform work orders and repairs for the different properties in their portfolio. In 2018, we also instituted a unit turn team concept, which consists of 5 staff, including a lead, whose specific responsibility is to turn vacant units within all of our properties. The goal is to bring down costs, by having a dedicated team, and using less contract maintenance. It is important to note that when working in a unit, the maintenance personnel are charged directly to the property they are working in.

Acquisition of Goods

THA has been operating under a decentralized purchasing model for the acquisition of goods. Site staff is primarily responsible for purchasing supplies for the properties they oversee. Purchases are primarily completed through a P-Card system, while in certain circumstances Purchase Orders continue to be used.

Acquisition of Services

While the acquisition of goods is decentralized, the agency has adopted a hybrid approach to the acquisition of its services. Centralized duties include the oversight of the contract needs of the sites, management of the bid process, vendor communication, and contract compliance. The sites are responsible for scheduling work, approving invoices, working with the centralized staff to define scopes of work, and ensuring the work is done properly.

D. Strategic Asset Planning

THA's Asset Management Committee

THA has an Asset Management Committee consisting of key members from the following functional areas in the agency: Finance, Asset Management and Compliance, Property Management, Client Support, and Real Estate Development. The committee meets on a routine basis and is facilitated by the Agency's Asset Manager. The standing agenda includes reviewing operational costs at each site, investigating large cost variances between the properties, analyzing property performance metrics, and comparing cost data and operational data to industry standards. THA also uses financial models to compare our metrics to properties managed by private firms. The committee also considers any policy changes having a potential impact on the operation of its properties and decisions regarding property acquisition and disposition. Some examples of policy changes discussed here include changes to THA's current rent policy and occupancy standards, whether properties should be managed by agency staff or third-party management.

The overall purpose of the committee is to ensure that THA makes decisions in a way that fosters appropriate communication between the major functional areas concerned with Asset Management and address related issues and concerns from a holistic perspective.

The cost approach developed by THA as described in the next section of this LAMP allows this committee and others in the agency to make informed decisions concerning the agency's portfolio. The cost approach will clearly show which areas of the agency cost the most to run and which provide the most value to the mission of the agency.

E. Cost Approach

THA's current cost approach is to charge all direct costs related to day-to-day operations to the specific property or program fund and to charge all indirect costs to a central fund (see "Program Support Center" below). The PSC would then earn fees that they charge to the programs they support. Client Support and Empowerment expenses that benefit THA's Affordable Housing properties will be charged out to a direct grant or the Moving to Work program. For purposes of this Cost Approach, properties refer to ones that THA owns or manages and the term program refers to the Rental Assistance and Moving to Work programs administered by THA. By the end of 2019, THA will own only five Public Housing units outright. We converted our existing ACC Public Housing portfolio to RAD, setting up a new Tax Credit entity in 2016. The remaining Public Housing units are owned by our existing Tax Credit entities, and all except Hillside 1500, with 4 PH units will be converted by the end of 2019. We currently manage our properties in our Tax Credit entities.

THA developed this approach for the following reasons:

1. It allows the agency to easily see the costs directly related to the day-to-day operations of a property or program and determine whether the management of that cost center can support itself. Staff managing the programs and properties will be able to easily discern all related administrative and shared costs. Managers will negotiate if costs are determined unreasonable or if the AMP or program cannot support the proposed fees.
2. One of the goals of the MTW program is to increase administrative efficiency. By charging these costs out as a fee, it will be easier in the future to identify the administrative efficiencies at the program/project level and the indirect costs that support them. The tax credit entity fees paid to THA is based on a % of their Operating Income and is distributed to the various support areas within THA.

Activity Areas

THA created three separate activity areas in order to track what it costs the agency to support different types of activities in which the agency engages. The three activity areas are:

- Conventional Affordable Housing (MTW)
- Tax Credit Management (MTW)
- Business Activities (Non-MTW)

THA decided to separate MTW activities into Conventional Affordable Housing and Tax Credit Management in order to tell how much it costs to manage its Tax Credit Portfolio versus its other affordable housing programs, including any remaining Housing properties we may manage, and Section 8. THA considers any other activities as Non-MTW activities and the revenues and expenses fall under the Business Activity area.

Program Support Center

Each of the three activity areas (Business Activities, CAH Activities and Tax Credit Activities) will have a Program Support Center (PSC). This is the equivalent of the Central Office Cost Center (COCC) under the HUD Asset Management model and it contains all of the programmatic support costs related to each of the three activity areas. The expenses will be split out to one of the three support centers based on unit equivalency and where the project or program resides to more clearly identify where administrative expenses fall and measure either the profitability or cost to each of the identified areas.

The end of this plan indicates the breakdown of how the administrative cost portion of the PSC will be charged out.

Direct Costs

Any costs that directly and wholly support a particular project or program will be charged as Direct Costs to the respective project or program. The following chart outlines which costs are considered Direct Costs.

Program Area	Cost Type	Comments
Property Management	Personnel Costs	
	Office Rent	
	Insurance	Includes property and liability insurance directly related to the AMP
	Program Support Fees	Fees charged to the properties for administrative overhead and costs allocated out that are not under the direct purview of the managers
	Administrative Costs	Includes postage, legal, office supplies, training and travel, mileage, professional services, and eviction costs
	Maintenance Costs	Includes materials, maintenance personnel costs, and contracts
	Utilities	
	Security	
	Relocation due to Reasonable Accommodation	
	Collection Loss	
Rental Assistance	PILOT	
	Debt Service Payments	
	Audit Costs	
	Personnel Costs	
	Office Rent	
	Insurance	
	Program Support Fees	HUD fees and leasing
	HAP Expenses	
	Audit Costs	
	Administrative Costs	Includes postage, legal, office supplies, training and travel, mileage, professional services, and eviction costs

Table 1: Direct Costs

Indirect Costs (Program Support Fees)

Any indirect costs incurred by THA in support of its projects and programs will be incurred by the Program Support Center. The fees are:

- Administrative Support Fee based on HUD model. This also includes IT, Elderly Service coordinator and leasing cost. We choose not to allocate any costs out to a program or project that is not under their direct control.

Project Support Fee

The Administrative Support Fee will cover the costs of the services provided by the following:

- Executive Department
- Purchasing
- Asset Management, including compliance
- Human Resources Department
- Client Support and Empowerment
- Accounting and Financial Services
- Real Estate Management and Improvement and Capital Fund Monitoring
- Information Technology
- Reasonable Accommodations
- Leasing and Elderly Services Coordinator
- Policy, Innovation and Evaluation

There will be two separate rates, one for Rental Assistance programs and one for managed housing units. The fee charged to Rental Assistance will be charged to all Rental Assistance Baseline units (MTW Vouchers, FUP, NHT, VASH, etc.) Our MTW vouchers (other than RAD) and Mod Rehab properties will be charged based on our MTW baseline regardless of occupancy. RAD our special program (FHP, NHT, VASH) will all be charged based on occupancy. The following chart shows how these fees are derived. For Rental Assistance, THA is using the HUD prescribed Management Fee. The Bookkeeping fee is reduced to correspond to a more accurate cost of defined support to the program. The IT fee is also reflective of direct support to the program. The Property Management units we manage are almost exclusively Tax Credit properties and their fees are based upon an agreed upon % with our Tax Credit partners and investors in their respective Operating Agreements. We do make decisions as to how we will break those fees down once they are received at THA. THA will reserve the right to use any available excess operating subsidy remaining in any remaining Tax Credit AMP to cover deficits in the Tax Credit PSC. Fees that would be allocated out (leasing, Elderly Services coordinator, IT) are charged as part of the fee in order not to have any expenses allocated out that Property managers do not have any control over.

Administrative Support Fee Components		
Fee	Rental Assistance	Tax Credit
Management Fee		
Executive	\$2.00	\$2.00
Human Resources	\$1.50	\$2.00
PM O'hd (including rent)	\$2.50	Remaining
Bookkeeping Fee	\$6.00	\$20.00
Asset Management Fee	\$0.00	\$10.00
IT Fee	\$6.50	\$9.00
Community Services	\$3.00	\$2.50
Leasing Support		\$1.50
Total Fee:	\$21.50	\$47.00

Table 2: Administrative Support Fee Components

Cost Centers

Property Management

Property Management uses of funds includes the Direct Costs and Project Support Fees for all of the properties managed by THA. The Property Management source of funds includes Capital Fund, Tenant Revenue, Operating Subsidy, and Other Revenue. By the time this is submitted, THA should be finalizing the conversion of all but five of our remaining Public Housing units in existing Tax Credit entities to RAD.

Rental Assistance

Rental Assistance uses of funds include the Direct Costs and Program Support Fees for all of the voucher programs managed by THA's Rental Assistance Division. These programs include Housing Choice Voucher (HCV), SRO, Project-Based Vouchers, FUP, VASH, NHT, and HUD FSS. The sources for Rental Assistance primarily include HAP Revenue and the Administrative Fees paid to the agency by HUD.

In addition to the fees Rental Assistance pays to the Program Support Center, there are other fees paid and earned in this area. All direct costs for all of the Rental Assistance programs will be recorded in our main Section 8 HCV fund in the MTW program. A fee will then be charged to our SRO and non MTW Section 8 programs based on unit equivalencies. This fee will be income earned by the MTW Section 8 HCV program for reimbursement of the expenses incurred by them. The chart below shows the equivalencies used.

Client Support and Empowerment (CSE)

The Client Support and Empowerment department supports all THA's Affordable Housing clientele and assists families to move to Self Sufficiency. As we continue to transition our new Voucher holders over to the Housing Opportunities (HOP) program that is both time limited, and a fixed subsidy program, these services have become more important. Additionally, THA has received several grants that provide funding for a variety of services to its clients. Most of these grants do not come with coverage of administrative overhead. None of the income or expenses for direct grants will be part of the MTW program, but overhead costs not reimbursed by the grants will.

THA's CSE area has traditionally assisted clients when Property Management staff has requested their assistance to help families remain viable tenants when in crisis. Moving to Work status has allowed the agency to continue that role, along with assisting families in a more pro-active way to move towards self-sufficiency.

THA's CSE department will either hire caseworkers or collaborate with other agencies to assist families at different levels. CSE works with families who face hardship and cannot meet minimum rent or lease requirements, prepares them to succeed as tenants, and assists tenants in obtaining skills that allow them to become self-sufficient. THA is proud of this focus. It is what makes us more than a real estate developer, more than a landlord, and more than a manager of rental assistance. This is the work that makes us a social justice agency. This is the work that makes us an MTW housing authority.

In the agency's approach to CSE for the LAMP, the following applies:

- Income and Expenses directly related to a grant is not included in the MTW area.
- All administrative overhead not covered by these grants are charged to a CSE fund that tracks all MTW costs.
- The Elderly/Disabled Coordinator is charged out as a portion of the management fee to the elderly/disabled projects.
- The costs for the CSE staff assisting the agency's Property Management portfolio and MTW Voucher holders, along with the administrative costs associated with it, are charged to a CSE fund supported by the agency's MTW flexibility.
- Costs for both our Education Initiative and Asset Building Programs that are not covered by grant funds would be paid out of MTW funds.

In taking this approach, it allows the Client Support and Empowerment department to operate as a business activity. It is set up in such a manner that THA's Property Management area must negotiate for the level of service it desires and pays to receive, and the cost is known up front.

Real Estate Development

THA defines Real Estate development activities to include modernization of the current portfolio, investigation and design of new affordable and market-rate development opportunities, along with redevelopment of properties that have outlived their useful life. THA also acts as its own developer in building of affordable housing and is in the process of expanding its role in the Tacoma community. THA's approach to these activities is to charge any activities related to the current stock of affordable housing or activities funded to one of the two MTW activity areas, as applicable. Any time that THA earns a developer fee as a developer or performs tasks as either a Public Development Entity (PDE) or a Public Development Authority (PDA), all revenues and expenses will be considered Business Activities (Non-MTW).

Based on historic and projected activities, the agency estimates that Development activities make up approximately 15 % of the agency support. This figure will be reevaluated annually based on the projects in the pipeline, the funding available to support the activities, and current staffing levels. THA is continually on the lookout for how to increase the affordable housing portfolio, and if opportunities arise, THA intends to use its MTW flexibility for development and rehab of affordable housing units.

Other Considerations

Personnel

Personnel costs are broken out a number of different ways, depending on which program(s) the staff support, where the funding for the positions comes from, and what the function of each position is.

Rent

THA's main office houses the agency's administrative support staff, the Rental Assistance Division and the Real Estate Development Department. We used to break out rent separately as a line item in the budget and charge the different areas. This is now included in our Management Fee calculations.

Differences – HUD Asset Management vs. THA Local Asset Management

THA is required to describe any differences between the Local Asset Management Program and HUD's asset management requirements in its Annual MTW Plan in order to facilitate the recording of actual property costs and submission of such cost information to HUD:

1. THA is using a modified fee for service as outlined above. In addition to the fee, there are certain expenses (IT, Leasing, and Elderly service coordinator) that could have been allocated out, but as these expenses are not under the control of the Property Manager, we included in the fee structure charged out to the properties.
2. Under this plan, THA renamed its Central Office Cost Center (COCC) to the Program Support Center (PSC) and split it into the three different activity areas. In addition, the PSC will track the program management salaries that cannot be directly attributed to a specific project or program, and therefore would be allocated. The fees will be received in the PSC where the costs that would have been allocated out reside.
3. HUD's rules limit the transfer of cash flow between projects, programs, and business activities. THA intends to use its MTW resources and regulatory flexibility to move its funds and project cash flow among projects that support affordable housing without limitation and to ensure that agency operations best meet THA's mission and serve the agency's low-income clientele.
4. In determining the units to use for the basis of the fee, THA chose to use total units, regardless of occupancy status. This differs from the HUD Asset Management model where Housing Authorities are only allowed to charge management and bookkeeping fees for occupied units in each property. THA chose to deviate from the rule for two reasons: 1) THA believes that charging a fee for an unoccupied unit will serve as an incentive to the staff to get the unit leased because the program/property is paying a fee on a unit that is not occupied ; and 2) doing so will allow the administrative staff to budget on a known fee amount, along with covering overhead incurred by the agency whether a unit is leased or not.
5. Under the HUD Asset Management Model, the COCC financial information is reported as Business Activities. In THA's LAMP, each activity area has its own Program Support Center (PSC), which is the equivalent of the COCC, and the PSC's that support MTW will be included in the MTW Demonstration Program and the Business Activities PSC will be included in Business Activities column on the FDS.

Program Support Allocation Detail - The following chart is based on the information in place at the time of the plan. There may be some changes in property that will impact the actual information in 2020.

Table 3: Total units & Program Support unit equivalencies

Program Support Center Unit Equivalencies - 2020 Projected				
Cost Center	Funding Source	CAH (MTW) Unit Equiv.	Tax Credit (MTW) Unit Equiv.	Business Activities (Non-MTW) Total Unit Equiv. Units
Rental Assistance	Mod Rehab SR0003			30 30
	Mod Rehab SR0002			41 41
	Section 8 Vouchers	3,543		3,543
	Life Manor TPV Vouchers-	150		150
	Hillside Terrace Relocation Vouchers	103		103
	Wedgewood TPV	48		48
	Tahoma House TPV	6		6
	FUP Vouchers		50	50
	NHT Vouchers		100	100
	VASH Vouchers		182	182
	RTH RAD Vouchers	456		456
	Bay Terrace 1 RAD Vouchers	26		26
	Salishan 1 - 6 & Hillside 1 & 2 converting in 2019	343		343
Property Management: Local Fund Units	Salishan 7			91 91
Property Management	RTH1		150	150
Renew Tacoma	RTH2		162	162
Housing	RTH3		144	144
Property Management: Tax Credit Partnerships	Hillside Terrace	21		21
	Hillside Terrace 2	25		25
	Hillside Terrace 1500 Blk	16		16
	Bay Terrace 1	70		70
	Bay Terrace 2	74		74
	Salishan 1	90		90
	Salishan 2	90		90
	Salishan 3	90		90
	Salishan 4	90		90
	Salishan 5	90		90
	Salishan 6	90		90
3rd Party Managed - 50 % equivalency	Highland Crest		36.5	73
	James Center North - Unit equivalents estimate-		10	20
	New Look	24		48
	Outrigger Apts.		24.5	49
	Prairie Oaks		7.5	15
	Total Units			6,576
	Total Units for Allocation purposes	4,675	1,226	573
				6,474
Development	THA MTW Support -15%	148		148
	THA as Developer - 85%			838 838
	<i>Unit Equivalents - 15% of Total Units available for allocation</i>	148		838 986
	Total Units/Unit Equivalents - 15% of Units	4,823	1,226	1,411
	Program Support Center Equivalencies (% of All Units)	64.65%	16.43%	18.92%
				100%

Appendix B: Rent Burden Calculation

THA has defined ‘successful’ self-sufficiency outcomes for work-able families in its ESHAP, Traditional MTW, HOP, and FSS programs to be those that exit (or graduate) the program with a market rent burden not exceeding fifty percent. In exiting THA-subsidized housing with a market shelter burden of less than fifty percent, THA believes the family would have reached an adequate level of self-sufficiency to move off subsidized housing, thus giving another family from the waiting list a chance at benefiting from the program.

THA has determined that rent burden will be the primary metric used to assess self-sufficiency across its MTW initiatives. Whereas shelter burden is the percentage of household gross income paid towards rent and utilities, rent burden excludes the utility component. In federally subsidized housing, households have typically paid thirty percent of their income towards rent and utilities.

Methodology

Current (or actual) rent burden is based on what the household is paying today in terms of their subsidized rent. Current rent being paid by a household is the numerator in the rent burden formula. For voucher programs, current rent will be the remaining after ‘HAP’ is subtracted from ‘Contract Rent.’ For non-voucher programs, rent in the numerator will be based solely on ‘Tenant Rent’. The denominator for all rent burden programs will be household monthly gross income (‘Annual Gross Income’ as shown in Open Door divided by twelve to get a monthly figure). To calculate the current rent burden, current rent will be divided by the household gross income.

Market rent burden assumes the household is paying an unsubsidized market rent. THA’s latest payment standards for the HCV program will be applied to each household based on the voucher size (for voucher households) or actual unit size (‘Bedrooms Unit’ as shown in Open Door) for non-voucher households in order to estimate a market rent. These payment standards will be used to estimate market rent for all THA households including those in non-voucher program programs such as Public Housing, RAD and tax credit situations. To calculate the market rent burden, the market rent (‘Payment Standard’ in Open Door) will be divided by monthly household gross income (‘Annual Gross Income’ as shown in Open Door divided by twelve to get a monthly figure).

To calculate rent burden, each variable in the formula as outlined above will be summed across all households in specific populations and used to calculate rent burden, rather than averaging the individual rent burdens. In other words, the sum of all household rents (or payment standards in the case of generating a market rent burden) will be the numerator; and the sum of all household monthly

gross incomes will be the denominator. The rationale for this aggregated approach is that households with very low incomes can drive extraordinarily high rent burdens, which could skew average rent burdens disproportionately higher. Use of a median rent burden was also considered but it was determined the aggregated approach would generate similar numbers and be less prone to calculation errors.

Appendix C: THA's Strategic Objectives with Performance Measures

1. Housing and Supportive Services

THA will provide high quality housing, rental assistance and supportive services. Its supportive services will help people as tenants, parents, students, wage earners, and builders of assets who can live without assistance. It will focus this assistance to meet the greatest need.

To meet this objective THA will:

- Strive to increase the number of households and persons receiving THA housing or rental assistance.
- Maintain an economic, racial, ethnic, language, age and differed abilities diversity that is reflective of our community.
- Provide the support and incentives necessary to help households to increase their household incomes.
- Help households get banked and build assets.
- Monitor the educational outcomes of students in our programs and provide interventions where necessary to help students succeed.
- Connect adult customers with education and employment services.
- Help households successfully exit THA's housing programs.
- Assess households on a scale of "in-crisis" to "thriving" and provide the services and referrals necessary to help households move to self-sufficiency.
- Regularly assess our service investments to ensure customers are satisfied and that the investments are offering the outcomes we hope for our customers.

2. Housing and Real Estate Development

THA will efficiently develop housing and properties that serve primarily families and individuals unable to find affordable and supporting housing they need. Its work will serve to promote the community's development. Its properties will be financially sustainable, environmentally innovative, and attractive.

To meet this objective, THA will:

- Increase the number and type of THA units.
- Improve the quality of housing that THA owns and manages.
- Increase the life-span of the units within THA's portfolio.
- Continue to develop and rehabilitate housing that is of award-winning quality.
- Improve the cost effectiveness of THA's development function.
- Assist in the development of affordable housing by other organizations.
- Reduce the amount of THA dollars in each development and increase the amount of private and public investments.
- Develop healthy and vibrant communities as measured by their incorporation of art and the walkability to community assets such as parks, schools, grocery stores, public transit and other community amenities promoting health.

3. Property Management

THA will manage its properties so they are safe, efficient to operate, good neighbors, attractive assets to their neighborhoods and places where people want to live.

To meet this objective, THA will:

- Lower its per unit per year operating costs.
- Increase its rent collection.
- Improve each property's cash flow.
- Maintain high quality properties.
- Schedule and complete capital repairs on a regular schedule.
- Maintain a high level of customer satisfaction as judged by customer surveys.

- Consult with customers in advance of any policy changes 100% of the time.

4. Financially Sustainable Operations

THA seeks to be more financially sustaining.

To meet this objective, THA will:

- Achieve an agency-wide operating surplus.
- Maintain minimum and maximum restricted and unrestricted reserves.
- Achieve a 1.15 debt-service ratio.
- Increase the value of THA's land and properties.
- Increase and diversify its income.

5. Environmental Responsibility

THA will develop and operate its properties in a way that preserves and protects natural resources.

To meet this objective, THA will:

- Develop environmentally responsible properties.
- Develop communities that incorporate creativity and healthy place making.
- Reduce energy and resource consumption.
- Reduce the use of greenhouse emitting products.

6. Advocacy and Public Education

THA will advocate for the value of THA's work and for the interests of the people it serves. It will be a resource for high quality advice, data, and information on housing, community development, and related topics. THA will do this work at the local, state and national level.

To meet this objective, THA will:

- Strive to maintain a positive public regard for THA.
- Lend staff to serve as effective members of community advisory panels.
- Be an effective advocate for the value of its work and the people it serves.

7. Administration

THA will have excellent administrative systems. Its staff will have skills that make THA highly efficient and effective in the customer service it provides to the public and among its departments. It will provide a workplace that attracts, develops and retains motivated and talented employees.

To meet this objective, THA will:

- Improve its operating efficiency.
- Lower its administrative costs per household served.
- Increase the number of households served per full time employee (FTE).
- Decrease the average amount spent on community service per client outcome.
- Increase its employee engagement scores.
- Decrease its staff turnover.
- Maintain positive audit results.

Embedded within each objective and strategy are unavoidable tradeoffs in the face of flat funding, increasing need and tightening rental markets. For example, a dollar spent on increased rental assistance or supportive services means serving fewer households, less support for leased housing and its tenants or weaker administration and customer service. THA can feel very confident about its judgment and the tradeoffs they denote. Yet some of them, like limits on rental assistance or increases, may not be occasions to celebrate. We may not have made some of those choices if Tacoma did not face an affordable housing crisis or if THA was flush with resources to meet it. Yet THA, in consultation with our community, will make these choices with the market we face and the resources we have. Within those constraints, THA feels proud and excited about these objectives and the path they set for its work and its city. MTW flexibility makes this work adaptable and innovative and helps give meaning to each of THA's seven strategic objective.



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A FIRST LOOK AT IMPACTS OF THE COLLEGE HOUSING ASSISTANCE PROGRAM AT TACOMA COMMUNITY COLLEGE

**Sara Goldrick-Rab, Christine Baker-Smith, Kallie Clark, Sonja Dahl,
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INTRODUCTION

Affording living expenses presents a major barrier to degree completion for many community college students. Food, affordable housing, transportation, and childcare are central conditions for learning. Yet with stagnant incomes, rising tuition and living costs, and insufficient support from financial aid and the social safety net, approximately one in two community college students struggle to afford these basic needs.¹ Additionally, as many as one in five experience homelessness.²

The College Housing Assistance Program (CHAP), operated by the Tacoma Housing Authority (THA) and Tacoma Community College (TCC), is at the forefront of the nationwide fight to ameliorate homelessness among college students.³ CHAP is one of the country's first partnerships between a housing authority and a community college and offers a unique model. In contrast to other programs such as student-run shelters, rapid-rehousing, and college-owned affordable apartments, CHAP utilizes government-subsidized housing assistance to provide housing to homeless and near-homeless community college students.

This report offers the initial lessons learned from the first external evaluation of CHAP. Successful program implementation is crucial to providing benefits for students, and can be especially challenging in housing programs. We therefore focus on how students experienced the program, where they faced barriers, and where they found support. It is too early in the evaluation process to draw conclusions about the program's efficacy; these are short-term insights.

THE COLLEGE HOUSING ASSISTANCE PROGRAM

The CHAP began in 2014 as a pilot program offering housing vouchers to 25 homeless TCC students.⁴ Since then, it has expanded several times.⁵ Over the course of the evaluation period (academic years 2017–18 and 2018–19), the program was designed to support 150 students with vouchers funded by the U.S. Department of Housing and Urban Development's (HUD) [Moving to Work program](#). The average monthly rental assistance was \$533; exact amounts depended on household size.⁶ Unlike traditional housing vouchers, which are income-based, all vouchers used in CHAP are worth 50% of the payment standard, an amount based on average rent of an apartment for each bedroom size.⁷ This means that students must have some income of their own to contribute towards rent. In this sense, CHAP cannot entirely fill the gap for

homeless community college students who have zero or very limited income. Vouchers were time-limited—students could retain the voucher for three years or until they graduated, whichever came first. For most of the evaluation period, TCC designated a staff person, whose title was “Resource Navigator,” with program outreach and case management responsibilities. Additional program information can be found in the [web appendices](#).

Both homeless and near-homeless students could apply for support from CHAP. During the evaluation period, all eligible homeless students were automatically admitted to the program and referred for a THA voucher. A lottery was used to determine admission of near-homeless applicants, since the program could not serve them all. Applicants denied admission could reapply during a later cycle; some did and were accepted.⁸ Correspondingly, the evaluation includes a descriptive study of homeless applicants and an impact study for near-homeless applicants, utilizing the lottery-based comparison group.⁹

A HOUSEHOLD EXPERIENCING ANY OF THE FOLLOWING:

1. Unable to meet basic housing expenses such as rent, mortgage, or utilities that will result in the loss of permanent housing;
2. Residing in a motel/hotel due to loss of permanent housing and lacks the resources to remain;
3. Has lost permanent housing and is living temporarily with a friend or family member and cannot be placed on the lease;
4. Eviction notices that will result in loss of permanent housing;
5. Pending unlawful detainer notices that will result in loss of permanent housing;
6. Recent history of serious housing instability;
7. Is a victim of domestic violence; or
8. Is facing discharge from a public institution (e.g., incarceration, hospital, etc.) without a housing discharge plan

= AT SERIOUS RISK OF HOMELESSNESS (NEAR-HOMELESS)

A HOUSEHOLD THAT IS:

1. In an emergency shelter or in a transitional housing facility; or
2. A client of a case-management program serving the homeless

= HOMELESS

“It’s hard when you’re homeless or when money is a real issue.... It’s very hard to study and pay attention and to function when...I don’t have a place.

– CHAP participant

Knowing you’re going to have a roof over your head is a big stress reliever... it’s important because it helps students be successful.”

– CHAP participant

EVALUATION DESIGN

The evaluation has three components:

1. An implementation study examining how the program operated and how students navigated the program. Includes interviews and survey data.¹⁰
2. A descriptive study tracking homeless students’ outcomes over time. Includes administrative and survey data.
3. An impact study comparing outcomes between near-homeless students admitted to the program and not admitted to the program via random lottery. Includes administrative and survey data.

For more information on evaluation methodology, see [web appendices](#).

CHAP APPLICANTS

TCC students face many challenges on their path to a credential. Many have children, work in order to make ends meet, and/or are the first in their family to attend college. Like community college students throughout the country, most take more than three years to graduate due to numerous barriers.¹¹ Living in Tacoma introduces an added, but not unique, challenge: an increasingly expensive and highly competitive rental market.

During the evaluation period, 64% of TCC students were women, at least one-quarter were people of color, and their average age was 27. Compared to the overall TCC population, students who applied to CHAP were disproportionately female and Black (see data in [Appendix E](#)). They also were older, more likely to hold GEDs than high school diplomas, had much lower Expected Family Contributions (EFC), and had lower GPAs. These differences between program applicants and TCC’s general population reflect disparities in the risk of housing insecurity. If the evaluation findings are generalizable, they apply to community college

students who are most at risk of housing insecurity. On their initial application to the program, students indicated a variety of immediate circumstances that led to their becoming homeless or near-homeless, including a loss of income, medical issue, family crisis, domestic violence, being new to Tacoma, or being evicted. Many experienced food insecurity, and a large share of the near-homeless students are parents.

PROGRAM IMPLEMENTATION

To obtain housing from CHAP, students need to navigate the program's many stages, which include completing two applications, being accepted, searching for housing, and ultimately securing housing that they will partially pay for with a voucher. This lengthy process, detailed in Figure 1, challenged many homeless and near-homeless applicants.

FIGURE 1 | NAVIGATING CHAP: THE STUDENT JOURNEY

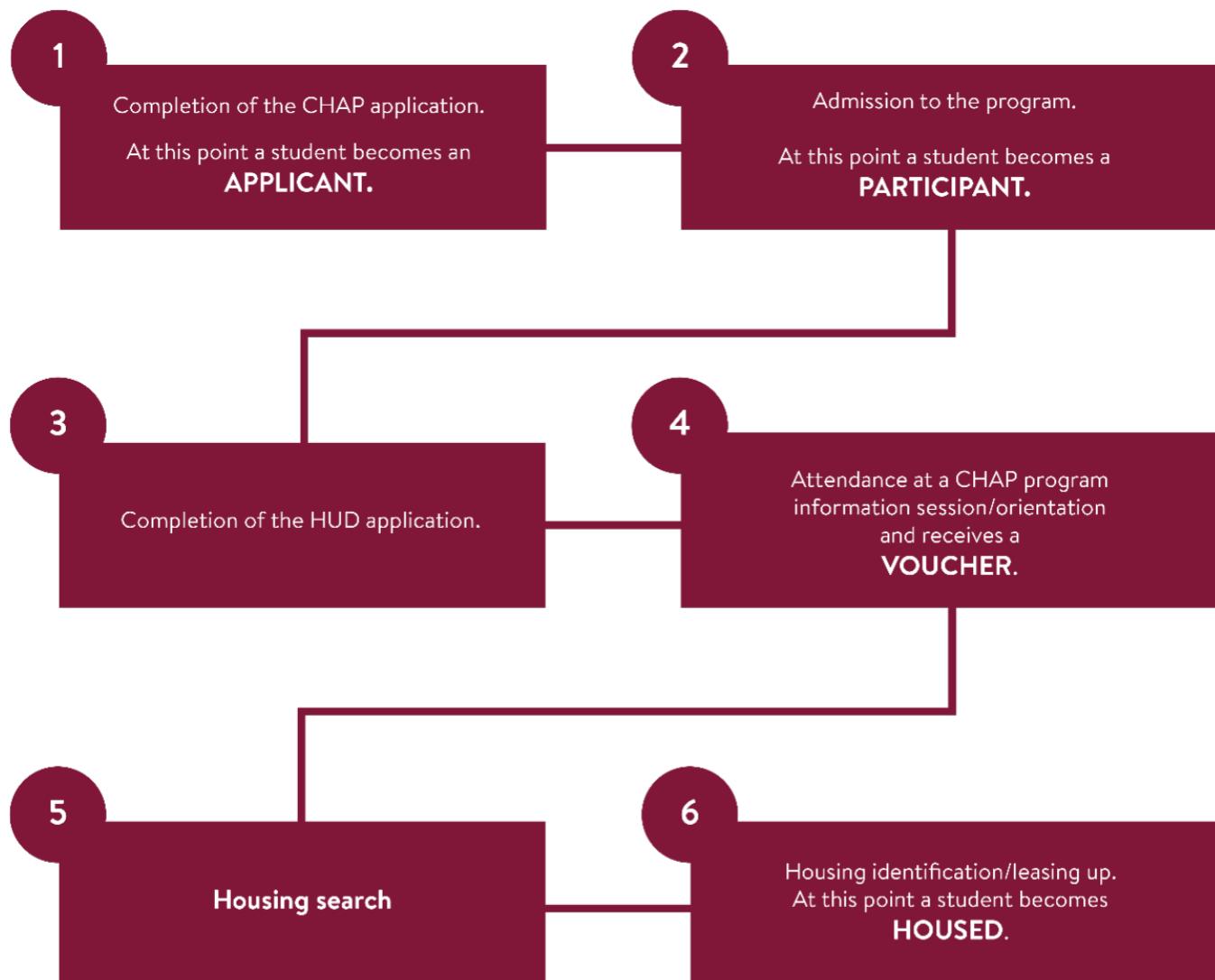
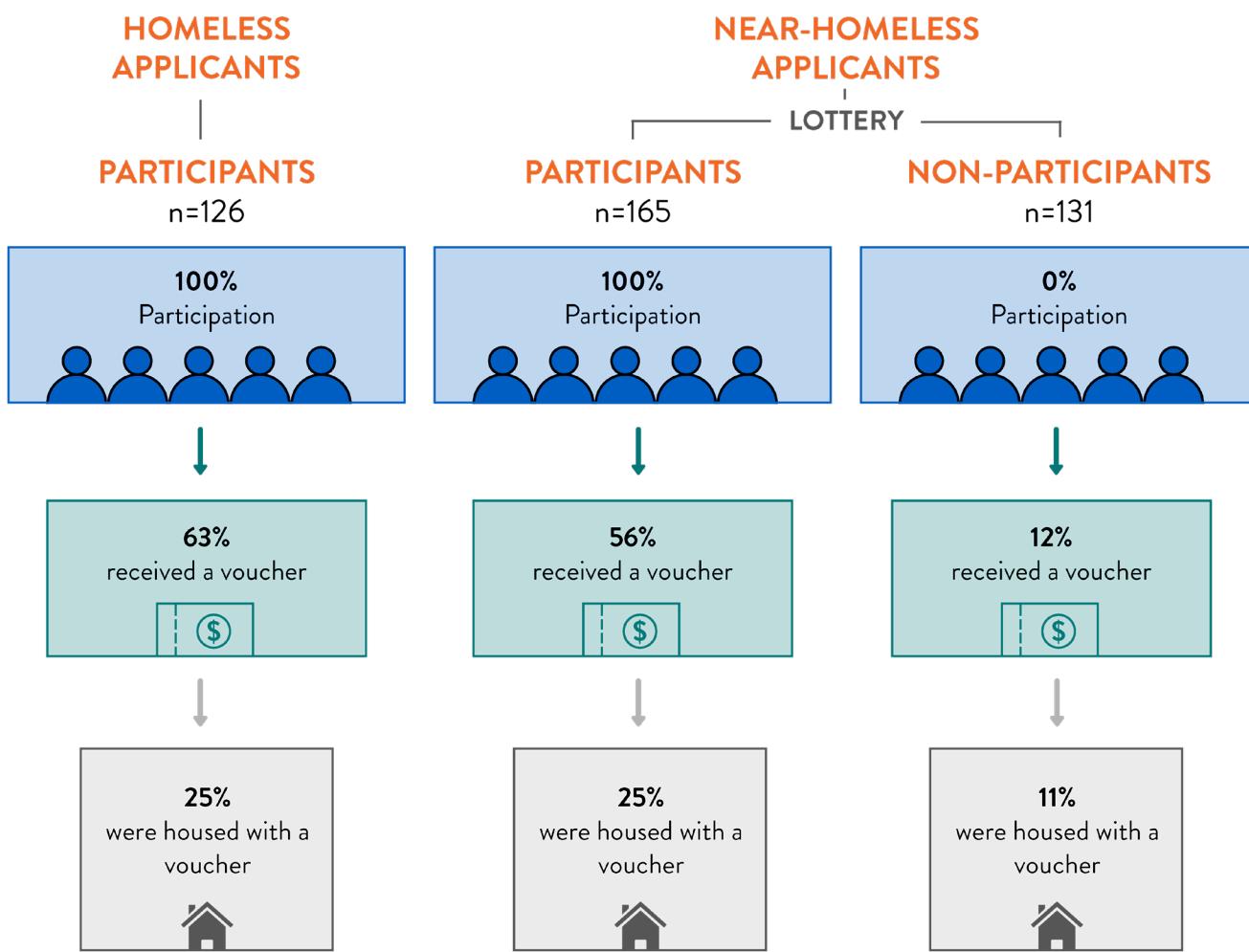


Figure 2 shows that most applicants admitted to the program did not secure housing. Approximately two-thirds of homeless students, and slightly over half of near-homeless students admitted to the program, received a housing voucher. But only one in four homeless and near-homeless participants used that voucher to become housed.¹²

FIGURE 2 | STAGES OF NAVIGATING CHAP



SOURCE | Administrative data (THA)

APPLICATION BARRIERS

In order to understand why so few students were housed, it is necessary to examine specific steps of the program's process. Complex application and reporting requirements have been shown to hinder access to a wide variety of public programs.¹³ One factor in the drop-off between admission ("participation" in Figure 2) and receipt of a voucher is the HUD application, which requires students provide significantly more documentation than the initial CHAP application. The Resource Navigator at TCC was often able to assist students in completing the HUD application. However, our survey data suggest that some students still needed more help.¹⁴ This was particularly true of homeless students who may no longer have access to official documents required for the HUD application.

Simply obtaining the necessary documentation was a challenge for more than one in ten students.¹⁵ On top of producing paperwork, our interviews with CHAP participants revealed that finding time for the extensive HUD application was difficult as they also were juggling the challenges of their existing housing situations and their responsibilities as students, workers, and caregivers. For example, at the time of her interview, one student worked full-time, attended TCC part-time, and cared for her child and two nieces, who all lived with her. Under these circumstances, it was difficult for her to find the time and energy to complete the application and pull together documents for all three children. The Resource Navigator at TCC also reported that students who had moved frequently or had left home abruptly to escape domestic violence faced particular challenges.



"I feel like the process for initially applying to actually get in it was long, especially when, you know, your risk is homeless with kids.

– CHAP participant

HOUSING SEARCHES AND BARRIERS TO SECURING HOUSING

After obtaining a voucher, multiple steps in the process remain: participants search for housing, identify a place that would accept the voucher, finalize paperwork between the landlord and THA, pay the security deposit, and at long last move into their new home. These steps included some of the toughest obstacles that prevented students from fully taking advantage of the program. Based on interviews with program staff and students, the main challenges were:

1. Location and vacancy: Identifying units in a tight housing market that were within reasonable distance from TCC and/or students' workplaces proved to be quite difficult. In many cases, students also had to factor in yet another location, such as a childcare provider or their children's schools.

2. Affordability:

- A student must have the ability to pay rent to make use of the voucher. Not all students, particularly those applying for the program, have the ability to pay rent in the first place; the program best serves students that can pay some rent.
 - Landlords often required that their tenants' incomes were at least three times the portion of the rent that they were responsible for. Many CHAP students did not meet this threshold.
 - The value of the CHAP voucher was often not enough to meet students' needs in an area with low vacancy and steep housing prices—prices that continue to increase.¹⁶ While the voucher was never intended to cover the full rent, it was meant to make housing more affordable.
 - Paying security deposits and other moving costs presented an additional, albeit one-time, hurdle.
3. Discrimination: Many landlords would not rent to CHAP students. In addition to subjecting them to negative stereotypes as voucher recipients (which is illegal in Tacoma), landlords judged them for being students, assuming they were irresponsible or otherwise risky tenants.¹⁷
4. Paperwork: Once participants identified potential rental units, they struggled with still more paperwork, including apartment applications and agreements between the landlord and THA.

Luz (pseudonym), a near-homeless student, was living with her two children at her brother's house when she found out about CHAP. She submitted her CHAP application at the end of October, knowing that she had to be out of her brother's house by November 1. After being admitted to the program, Luz thought that she would have the voucher soon. She moved her family to her mother's house outside of Tacoma, which was her last possible housing option and meant a longer commute to work, school, and childcare. She planned to stay just two weeks, but after filling out the HUD application, receiving a voucher at an orientation session, searching for housing, and moving her family into her new apartment, it was December 29. A few days later, the landlord had still not filled out the final THA paperwork, so Luz had to pay full market rent for January, which was not sustainable in her long-term budget. Luz again asked her landlord to complete the paperwork. A couple more weeks passed without a response, so Luz went to the landlord's office and gave them a blank copy to fill out. The landlord completed the paperwork this time, and Luz faxed it to THA. But there were still some forms missing. At the time of her interview, near the end of January, Luz was still trying to resolve the issue. A search of THA's administrative records revealed that she was eventually able to use her voucher, but without her extraordinary efforts, she might never have been able to do so.

These difficulties are not unique to CHAP. Other studies on HUD voucher programs document similar barriers to securing housing, including landlord discrimination against voucher-holders, scarce and expensive housing markets, financial (e.g., security deposits) and logistical (e.g., transportation to prospective apartments) costs, demanding deadlines, and confusion about housing authority rules and paperwork.¹⁸

STAFFING

Sufficient staff resources are critical for effective program implementation. With limited resources, TCC and THA both contributed staff to the project, including for program oversight and administration, case management and coaching, program navigation, and processing of applications, vouchers, and other paperwork. This work also includes disbursing rental assistance, data management, and relationship management with external organizations and departments of the college and housing authority that offer additional supports. On the college side, these roles require skills beyond those required for traditional student affairs positions, making it particularly difficult to find qualified staff. For the housing authority, it is essential to have dedicated staff to support students and their unique needs (such as a project manager with a background in post-secondary education), which requires additional resources. Students' need for support from staff across multiple domains often complicates the search for housing and success in this process. These issues impact not only program effectiveness but also equity.



"I can't get the people to call me back or email me back... I have the voucher, I have the money, I have everything, and I still cannot find [housing]... I have called and emailed probably 100 places.

—CHAP participant

EQUITY CONCERNs

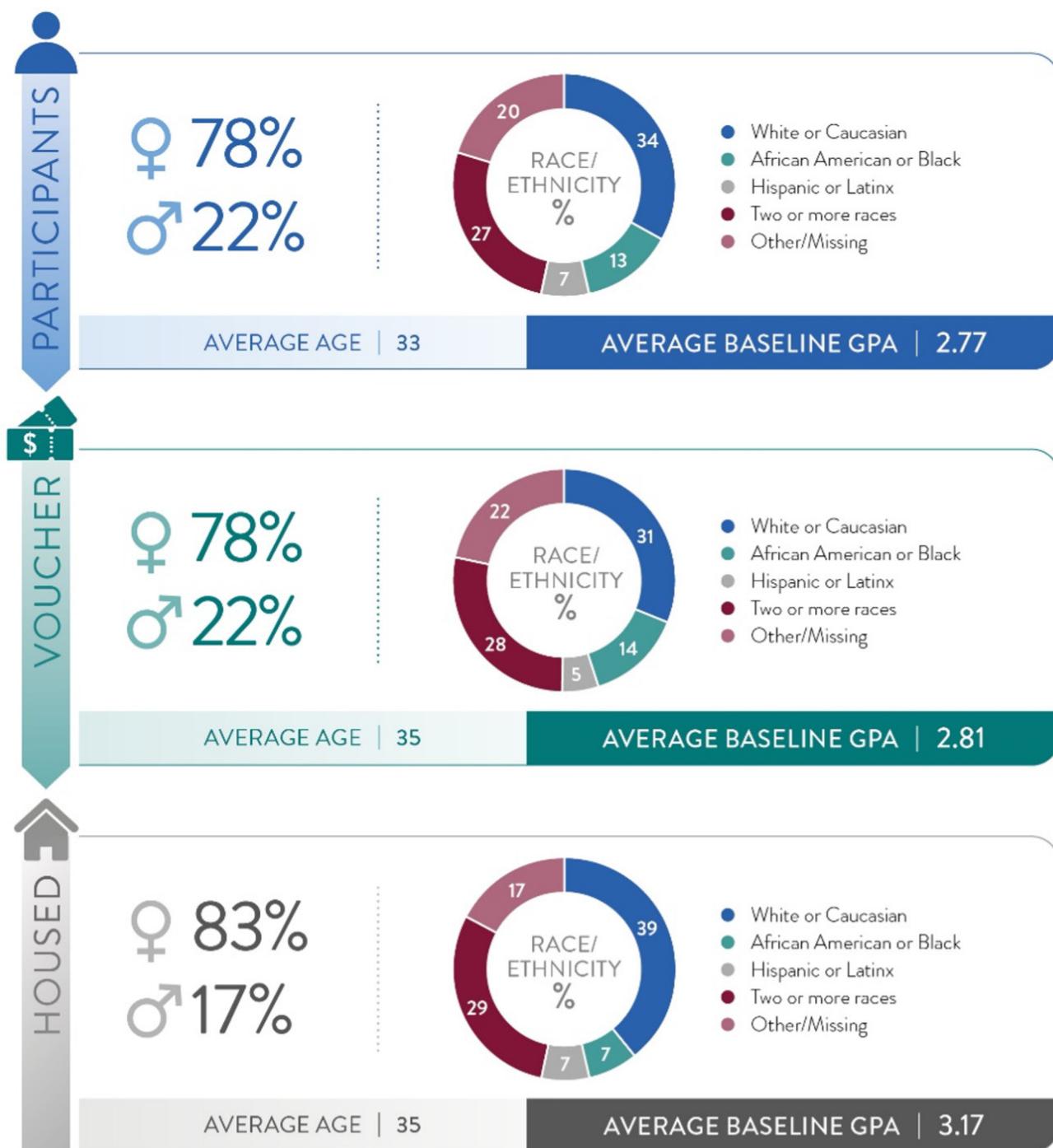
CHAP best serves students who already have some form of income; among these students relatively few participants were able to eventually secure housing, and there were also disparities in who among those participants was able to do so. This suggests that the barriers we outlined above were more prominent or posed more of an obstacle for some students than others.

Figure 3 illuminates these disparities by showing characteristics of near-homeless participants at each of the stages depicted in Figure 2. The main takeaways are:

1. Female and male students obtained vouchers at similar rates, but female students were slightly more likely to eventually secure housing.
2. Black students are underrepresented among those who secured housing, compared to both participants and voucher-holders.
3. Older students are more likely to complete the process than younger students.

In addition to these gender, race, and age disparities, students with stronger academic profiles were much more likely to obtain housing. Compared to the wider pool of all students admitted to the program, students who secured housing had significantly higher average GPAs at the time they were admitted to the program. Independent of programs like CHAP, having a higher GPA can signal not only academic proficiency but also an ability to navigate bureaucracies—meaning they know how to register and drop classes, who and how to ask for help, etc.¹⁹ This pattern in the data suggests that students with less experience navigating systems like higher education and safety net programs may be less likely to secure the benefits of housing programs without additional supports.

FIGURE 3 | CHAP PARTICIPANT CHARACTERISTICS BY HOUSING STATUS



SOURCE | Administrative data (TCC & THA)

NOTES | Student background information on race/ethnicity and term GPA come from TCC administrative data at baseline. Gender and age are drawn from program application data. Missing data were imputed using multiple imputation with regression as recommended by What Works Clearinghouse (2020). “Housed” includes only participants who were housed with a voucher; it does not include those housed with property-based subsidies (n=5 for the full evaluation sample). The sample for this figure includes near-homeless students assigned to treatment (n=165). Categories may not total 100% due to rounding.



INITIAL PROGRAM OUTCOMES

Providing housing matters. In the space of two academic years, 91 homeless and near-homeless students were able to secure safe, stable housing through CHAP, with all the potential benefits for them and their families that such security can bring. The CHAP program was launched with the intent of improving academic attainment. In that spirit, we next look at the potential impact of CHAP on students' success in college in the two quarters after they applied to the program.²⁰

Stable housing may provide long-term benefits that we cannot yet observe but, thus far, the results are inconclusive. With only two quarters of data available for students in each application cycle, we can only explore short-term impacts. The relatively small number of students in the evaluation combined with the low percentage of students who were ultimately able to obtain housing also limits our ability to assess impacts.

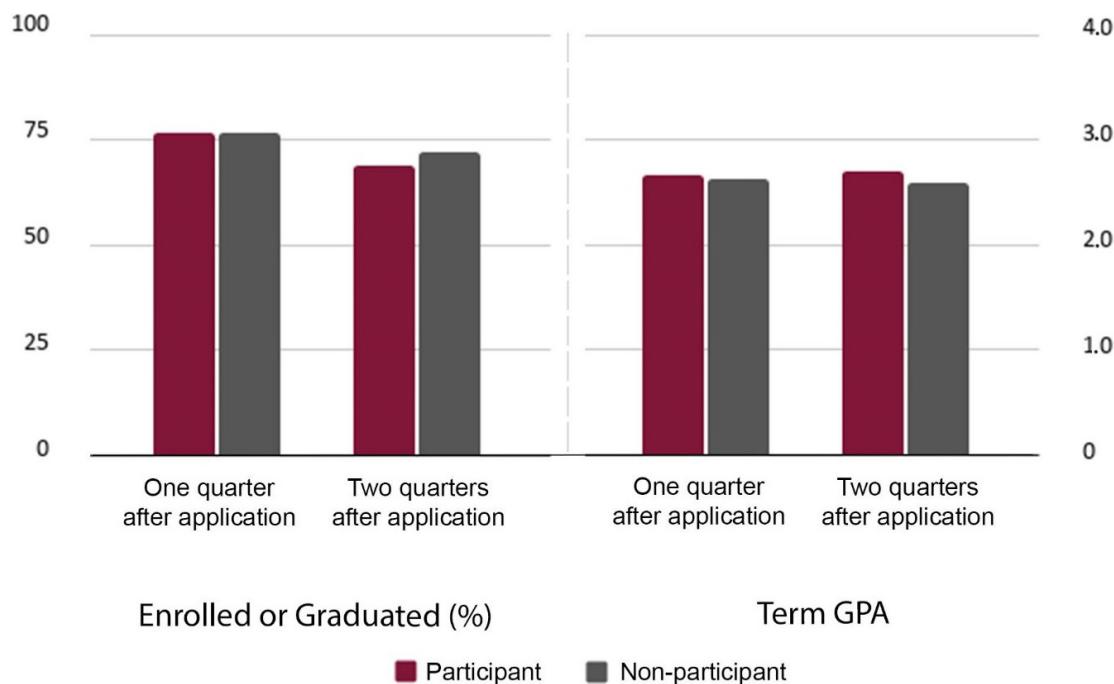


[The] voucher would absolutely 100% help. And you know, that would allow me to be not so stressed out about putting gas [in my car], being able to eat, and you know focusing on school."

– CHAP participant

For near-homeless students, we compare CHAP participants (those admitted to the program via lottery) to non-participants (those not admitted via lottery) in order to understand the program impact, independent of other factors. The use of a lottery in determining program admission for near-homeless students ensured that, independent of the program, students faced similar odds of succeeding in college when they applied. Figure 4 examines the impact of being admitted to CHAP on: a) whether a student remained enrolled or had graduated at the end of the term, and b) if still enrolled, what, if any, change appears in the student's term GPA. These outcomes are displayed at two points in time: one quarter and two quarters after application to the program.²¹ Though there are small differences between those who were admitted to CHAP and those who were not, with the data we have, we cannot be confident that these differences are significant.

FIGURE 4 | IMPACT OF CHAP ON ACADEMIC OUTCOMES FOR NEAR-HOMELESS PARTICIPANTS, ONE AND TWO QUARTERS AFTER APPLICATION

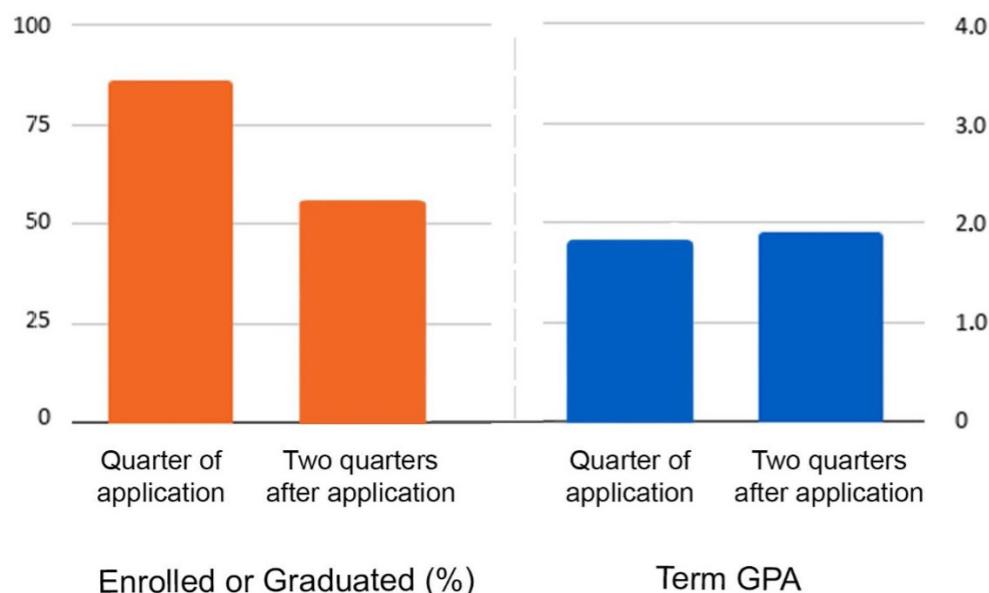


SOURCE | Administrative data (TCC)

NOTES | This figure reports on adjusted intent-to-treat (ITT) estimates. Term GPA impacts are derived from linear regression models. Enrollment impacts are derived from logistic regression models. Enrollment or graduation is reported as probability; term GPA is reported in GPA points. This model controls for cohort and variables not equivalent at baseline: gender, race, age, GPA at baseline, high school education, marital status, and Expected Family Contribution (EFC). See [web appendices](#) (Appendix F) for more information about variables excluded from analysis due to small cell size. Missing baseline data have been imputed using multiple imputation with regression as recommended by What Works Clearinghouse (2020); no outcomes were imputed. "Enrolled or Graduated" represents the percentage point difference between students in the treatment group and control group who were currently enrolled or who had completed a degree or certificate. Enrollment at TCC was a condition of admission to the program; however, since outcome data comes from enrollment records at the end of the quarter, not all students were enrolled at that time. Term GPA is based on enrolled students only. Quarter refers to academic quarters: fall, winter, and spring.

Keeping in mind that no comparison group exists for homeless CHAP students in this evaluation, we simply show the trajectory of students' academic outcomes. Figure 5 shows that two terms after application, 56% of homeless students either had graduated from or remained enrolled at TCC. Among homeless students who were still enrolled, the average term GPA was only slightly higher than their average GPA when they applied to CHAP.

FIGURE 5 | ACADEMIC OUTCOMES FOR HOMELESS STUDENTS OVER TIME: QUARTER OF APPLICATION AND TWO QUARTERS AFTER APPLICATION



SOURCE | Administrative data (TCC)

NOTES | Term GPA is based on enrolled students only. "Enrolled or Graduated" represents the percentage of students who were currently enrolled or who had completed a degree or certificate two quarters after baseline. Enrollment at TCC was a condition of admission to the program; however, since data comes from enrollment records at the end of the quarter, not all students were enrolled at that time. This figure reports observed outcomes only (no imputation). Quarter refers to academic quarters: fall, winter, and spring.

THE EVOLUTION OF CHAP

Our evaluation tracks students who applied to CHAP between fall 2017 and spring 2019. Over that timespan and continuing today, the program has adapted considerably as it seeks to better meet students' needs. At TCC, case management for program participants and referrals to resources within the college and broader Tacoma community have expanded and become more systematized. In another notable addition, property-based subsidies were introduced in 2018 as an alternative means of providing housing. (In contrast to vouchers, which are assigned to individuals and thus classified as "person-based," property-based subsidies are assigned to specific housing units.) In an expensive and limited rental market, having apartments set aside for CHAP participants ensures that students do not need to compete for the few available market options they can afford with a voucher. THA has steadily increased the number of units with property-based subsidies, especially in partnership with the developer Koz. As of writing, there are a total of 289 subsidies allocated to the program—189 property-based subsidies, 75 person-based vouchers for general use, and 25 person-based vouchers set aside for future use with students returning from incarceration. Units and buildings for property-based subsidies vary with respect to rent, room sizes and numbers, and income eligibility requirements.

Many of the program's policies and procedures have changed as well. Eligibility criteria have shifted slightly and requirements for continued program participation have been relaxed, in acknowledgement of the many challenges CHAP participants face. This includes flexibility for students who may need to temporarily stop out or take fewer classes for a variety of reasons. (See [web appendices](#) for details.) After the last application period for students included in this evaluation, the program returned to using a waitlist rather than a lottery to determine who is admitted to the program. Homeless applicants continue to be prioritized over near-homeless applicants on the waitlist, and TCC provides case management support to students on the waitlist in addition to students in the CHAP program. The maximum time for students to continue to receive voucher assistance has also been increased, from three years to five, and students graduating with a college credential of any type (certificate, Associate's degree, or Bachelor's degree) can keep their assistance for up to a year after graduation.

Lastly, CHAP is no longer solely a partnership between TCC and THA, or even with developers and property management companies involved with property-based subsidies. CHAP now has a similar partnership with the University of Washington, Tacoma (UWT), with the notable difference that CHAP participants at UWT can only receive property-based subsidies, not vouchers. (CHAP students who transfer from TCC to UWT keep their housing assistance, however, including vouchers.) CHAP assistance is also available to certain high school students in Tacoma Public Schools, and the Washington State Department of Corrections is working on a program to refer citizens returning from incarceration who are studying at TCC but lack secure housing.

CONCLUSION

The Tacoma CHAP is a leading innovative attempt at addressing a difficult problem. The evidence clearly indicates that many community college students need help securing stable and affordable housing, and that the program can best support them by being as seamless and easy to navigate as possible.

Thus far, data indicate that students struggled to complete the detailed HUD application after being admitted to the program. It was difficult for them to find and move into housing that would meet their needs. And support from program staff in both of these areas was limited by capacity constraints. As a result, despite a strong need for stable, affordable housing, most students admitted to the program were not housed and there were inequities in who secured housing. Moreover, the voucher model makes it easiest for the program to serve participants that have at least some other form of income, which poses a challenge for students who do not. Given all these factors, the program's efficacy remains unclear at this point.

To continue improving CHAP and programs like it, we offer the following recommendations:

- 1. College housing programs should be adequately staffed and resourced.** Colleges and housing authorities both need consistent, qualified, and dedicated staff for this work. There are many responsibilities needed to effectively support students while also doing administrative tasks. Students need help navigating applications, meeting requirements, searching for housing, troubleshooting issues with landlords, and so on. Staff must also guide students through the transition from one institution/agency to the next to ensure continuity and clarity. A clear delineation of responsibilities between organizations should be established from the start, resources allocated accordingly, and accountability for performance on both sides clarified. Coordinating assistance is also important and a point person ought to be identified at each organization so that students are not lost in the gaps.
- 2. Consider additional assistance for housing searches.** Providing this type of support requires specific expertise. It may be helpful for higher education institutions and housing authorities to partner with local nonprofits who specialize in supporting voucher-holders. Landlord education, which CHAP has explored, could further reduce barriers. A philanthropically supported security deposit fund (which CHAP started in 2019) may be useful. Structuring voucher amounts to be accessible to students with zero or very limited non-voucher income might help as well.
- 3. Reduce administrative burden on students.** Wherever possible, aim for simple applications and transparent, streamlined processes, both in terms of establishing qualifications for support by the college and by the housing authority.

ON THE GROUND: REFLECTIONS FROM THA

As a new and innovative program, the College Housing Assistance Program (CHAP) has not been perfect. However, we have been responsive as the program has grown. In partnership with TCC, we have worked to address the barriers that we have learned about through evaluation and administrative data or have heard about anecdotally from program staff and participants. There are four particular areas where we have made program changes and where we continue to work to better serve students.

- **Housing Search:** To support students receiving tenant-based subsidies, we have partnered with the county to identify a third-party housing search and support resource. We expect this effort to improve the number of students housed by the program and bring about more equitable program outcomes.
- **Lease-Up Support:** In 2019, THA fundraised to develop a landlord mitigation fund for the newest property to partner with CHAP. This fund was used to negotiate with the property owner to reduce the screening criteria to ensure that students with no, or poor, rental/credit history would not be denied a lease. Over the past year, we have continued to fundraise in order to expand the landlord mitigation fund to the entire program.
- **Flexible Program Requirements:** Though not addressed in this report, we were initially concerned by the number of students who were being removed from the program early for not maintaining enrollment and academic progress requirements. In partnership with the college, we lowered the minimum credit requirement to allow part-time enrollment, made academic progress measures more flexible, and permitted students to take up to two quarters off, if needed.
- **Property-Based Subsidies:** Most significantly, THA has added “property-based” assistance to the CHAP program. This resource currently provides 189 apartments dedicated to CHAP students. THA owns some of these apartment complexes and has contracted with private developers to secure other units. THA then pays down the rents for those apartments so they reach a level affordable to program students. All these apartments are in walking distance of either the TCC or University of Washington-Tacoma campus. Crucially, these dedicated apartments eliminate the need to hunt and compete for housing on the private rental market, which allows CHAP students to avoid a major obstacle to securing housing in Tacoma’s extraordinarily tight rental market.

Since we serve students that have experienced homelessness, marginalization, or trauma, we want to ensure our processes and requirements respond to their needs and conform to their realities. Over time we have learned more about the areas in which students need greater support, and we continue to adapt in order to provide that support. We are grateful for the work The Hope Center has done to highlight and reaffirm where we direct those efforts.

ON THE GROUND: REFLECTIONS FROM TCC

Concerns about college affordability are widespread, and the biggest budget item while attending college is living expenses. Too often we see students' basic needs go unmet as they struggle to cover those costs by maintaining full-time employment while attending college. The College Housing Assistance Program (CHAP) offers a partial solution. While each student's situation is different, scholars have cited three main contributors to college student homelessness; lack of a living wage; lack of affordable housing; and conflicts with family/parents, including violence, neglect, and abuse. We understand stable housing does not address the myriad barriers our students face, such as lack of childcare, coordination of work and class schedules, and access to technology, but it is nevertheless an essential component.

The need for safe, affordable housing that is conducive to student retention and success is critically important to TCC students. The number of students seeking housing assistance through the CHAP program far exceeds the available housing supply, so the next phase of CHAP should continue to expand and explore housing options for homeless and near-homeless students.

Due to the lengthy application process, students that apply to the CHAP program are unable to immediately access safe housing. Emergency shelters that are designed to meet student needs could provide safety and stability until a student can secure permanent housing. The program should also consider creating temporary facilities that would provide computer labs, printers, kitchen areas, laundry machines, and restrooms.

College administrators should also continue to offer and expand food pantries, to provide counseling and mental health services, to facilitate access to emergency funding, and to ensure work study programs and on-campus employment are available for students. Lastly, campuses should provide information on the rights of homeless students as well as resources to help understand tenant rights and responsibilities in general. These additional services would support students' drive toward self-efficacy and agency.

ACKNOWLEDGEMENTS

We gratefully acknowledge the financial support provided by Arnold Ventures, the Kresge Foundation, and the U.S. Department of Housing and Urban Development (HUD) for making this project possible. We also extend our sincere thanks and appreciation to our partners, Tacoma Housing Authority (THA) and Tacoma Community College (TCC), for administering the CHAP program and supporting CHAP students. We also thank REL Northwest, which is operated by Education Northwest and funded by the U.S. Department of Education's Institute of Education Sciences, for their collaboration in an expansion of our exploration into students' reflections of the program.

Many Hope Center staff contributed to this report:

- Research and writing: Christine Baker-Smith, Stephanie Brescia, Kallie Clark, Sonja Dahl, Sara Goldrick-Rab, and Tiffani Williams.
- Communications: Stefanie Chae and Deirdre Childress Hopkins. We acknowledge the team at HudsonLake for their contributions to report design, and Cory Oldweiler for copyediting services.

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FUNDER DISCLOSURE

The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of our funders.

NOTES AND REFERENCES

¹ Goldrick-Rab, S. (2016). *Paying the price: College costs, financial aid, and the betrayal of the American dream.* University of Chicago Press.

² For research that documents the prevalence of housing insecurity and homelessness among college students, see: Broton, K. (2020). *A review of estimates of housing insecurity and homelessness among students in U.S. higher education.* *Journal of Social Distress and Homelessness*, 29(1), 25–38; Goldrick-Rab, S., Baker-Smith, C., Coca, V., Looker, L., Richardson, B., & Williams, T. (2020). *#RealCollege 2020: Five years of evidence on campus basic needs insecurity.* The Hope Center for College, Community, and Justice; Crutchfield, R., & Maguire, J. (2018). *California State University Office of the Chancellor study of student basic needs;* Broton, K., & Goldrick-Rab, S. (2017). *Going without: An exploration of food and housing insecurity among undergraduates.* *Educational Researcher*, 47(2), 121–133.

For research that primarily examines challenges that homeless and housing insecure students face, see: Cabrera, V., Jaffe, H., & LePage, N. (2020). *Student resilience in the face of challenges at California's Community Colleges.* California Homeless Youth Project; Ambrose, V. K. (2016). *It's like a mountain: The lived experience of homeless college students* [Unpublished doctoral dissertation]. University of Tennessee Knoxville; Gupton, J. T. (2017). *Campus of opportunity: A qualitative analysis of homeless students in community college.* *Community College Review*, 45(3), 190–214; Vasquez, M. C., Vang, M., Garcia, F., & Harris, F., III. (2019). *What do I eat? Where do I sleep? A concern for men of color in community college.* *Community College Journal of Research and Practice*, 43(4), 295–306.

For research that illuminates associations between college homelessness and academic success, see: Broton, K. (2017). *The evolution of poverty in higher education: Material hardship, academic success, and policy perspectives* [Unpublished doctoral dissertation]. University of Wisconsin–Madison; Silva, M. R., Kleinert, W. L., Sheppard, A. V., Cantrell, K. A., Freeman-Coppadge, D. J., Tsoy, E., & Pearrow, M. (2017). *The relationship between food security, housing stability, and school performance among college students in an urban university.* *Journal of College Student Retention: Research, Theory and Practice*, 19(3), 284–299; Crutchfield & Maguire, 2018; Goldrick-Rab, Baker-Smith, Coca, Looker, Richardson, & Williams, 2020.

³ Ash Center for Democratic Governance and Innovation. (2018). *2018 innovations in American government award top 25 programs.* Harvard University, John F. Kennedy School of Government.

⁴ Tacoma Housing Authority. (2021). *College housing assistance program: Project summary.*

⁵ Today the program can support more than 250 students across several subsidy types, including both person-based (i.e., vouchers) and property-based approaches. Since property-based subsidies were just beginning to be rolled out in the 2018–19 academic year, we focus on housing vouchers in this report.

⁶ Voucher subsidy amounts shifted slightly over time according to market trends. For average monthly rental assistance as of May 2019, see: Thompson, A. (2019). *College housing assistance program 2019 redesign.* Tacoma Housing Authority. For context, a study THA commissioned in September 2018 listed the “low-end” price for an “affordable market” two-bedroom apartment as \$750, with a market rate of \$1,395. Similarly, the *RentCafe* website lists the average rent in Tacoma, Washington, in November 2018 as \$1,266.

⁷ The payment standard is calculated based on housing market research. THA uses this method of determining voucher amounts for vouchers outside of CHAP as well; see: Tacoma Housing Authority. (n.d.). [Housing Opportunity Program](#).

⁸ Students who were denied in one cycle and later admitted are classified as their original status (non-participant) for the purpose of analysis, per What Works Clearinghouse standards.

⁹ See [web appendices](#) for more information on evaluation methodology.

¹⁰ We do not summarize survey or interview data in this report. However, student quotes and anecdotes throughout the report are from the interviews we conducted.

¹¹ Three years, or “150% of normal time,” is the standard length of time to measure community college graduation rates. However, national data show that most community college students do not graduate in that time. See National Center for Education Statistics. (n.d.) [Table 326.20. Graduation rate from first institution attended within 150 percent of normal time for first-time, full-time degree/certificate-seeking students at 2-year postsecondary institutions, by race/ethnicity, sex, and control of institution: Selected cohort entry years, 2000 through 2014](#) [Data set].

¹² Some applicants who were not initially admitted to the program reapplied and were admitted. The vast majority of those re-applicants became housed.

¹³ Herd, P., & Moynihan, D. (2018). *Administrative burden: Policymaking by other means*. Russel Sage Foundation.

¹⁴ Among CHAP participants who completed both an initial and a follow-up survey, about one-third of homeless students and one-fifth of near-homeless students reported needing more help completing the HUD application. Since survey responders tended to be relatively advantaged, we suspect that these challenges were more widespread among the full group of students.

¹⁵ This data also comes from our surveys.

¹⁶ For a news account summarizing a variety of studies on rising rents in Tacoma, see: Martin, K., & Cockrell, D. (2018, January 31). [How big are the rent increases here? Big enough to put Tacoma at the top of one list.](#) *The News Tribune*.

¹⁷ See here for the City of Tacoma’s protections for voucher-holders: City of Tacoma, Washington. (n.d.) [City of Tacoma’s Fair Housing Law](#).

¹⁸ Tremoulet, A., Dann, R. J., & Adkins, A. (2016). [Moving to location affordability? Housing choice vouchers and residential relocation in the Portland, Oregon, region.](#) *Housing Policy Debate*, 26(4–5), 692–713; Gubits, D., Khadduri, J., & Turnham, J. (2009). [Housing patterns of low-income families with children: Further analysis of data from the study of the effects of housing vouchers on welfare families.](#) Harvard University, Joint Center for Housing Studies; Orr, L., Feins, J. D., Jacob, R., Beecroft, E., Sanbonmatsu, L., Katz, L. F., Liebman, J. B., Kling, J. R. (2003). [Moving to opportunity interim impacts evaluation.](#) U.S. Department of Housing and Urban Development, Office of Policy Development & Research; Finkel, M., & Buron, L. [Study on Section 8 voucher success rates \(Volume I: Quantitative study of success rates in metropolitan areas\).](#) U.S. Department of Housing and Urban Development, Office of Policy Development & Research; Sard, B., & Gibson, S. (2015, December 11). [Understanding housing voucher utilization and success rates; Local applications for utilization and success rate challenges](#) [PowerPoint slides].

¹⁹ Gehringen, T. A., Folberg, A. M., & Ryan, C. S. (2021). [The relationships of belonging and task socialization to GPA and intentions to re-enroll as a function of race/ethnicity and first-generation college student status.](#) *Journal of Diversity in Higher Education*.

²⁰ To learn what outcome measures we are tracking beyond GPA and enrollment/graduation, see [web appendices](#). There are also numerous potential benefits to housing students and their families that we do not measure; for example, satisfactory academic progress (SAP), more flexibility in students' budgets, ability to pay off debt, and well-being and academic success of students' children when their families move less frequently.

²¹ For more detailed methodological information about the analyses we performed here, see [web appendices](#).



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TACOMA HOUSING AUTHORITY

**CLIENT SUPPORT
& EMPOWERMENT**



TACOMA HOUSING AUTHORITY

DATE: June 23, 2021

TO: THA Board of Commissioners

FROM: Cacey Hanauer
Director of Client Support & Empowerment

RE: Client Support & Empowerment Department Monthly Board Report

1. STRATEGIC OBJECTIVE: HOUSING AND SUPPORTIVE SERVICES

Tacoma Housing Authority (THA) will provide high quality housing, rental assistance and supportive services. Its supportive services will help people succeed as tenants, parents, students, wage earners and builders of assets who can live without assistance. It will focus this assistance to meet the greatest need.

2. DIRECTOR'S COMMENT

Client Support and Empowerment (CSE) continued to focus on increasing engagement and fine-tuning programs and resources to meet the stated needs of our clients, residents and voucher holders throughout the month of May. Over the last several years, CSE has been charged to show what a dollar of investment into the department shows in terms of a return on that investment. And, it has become increasingly clear that the department needs to further refine our scope of services offered directly and develop partnerships to meet the needs the department is not best positioned to meet. In March we began a strategic planning process, stewarded by Amy Van and BERK Consulting. This process is helping to: better understand our clients', residents' and voucher holders' needs; to define our Theory of Change; to develop a clear and more narrow scope of services; and, to ultimately answer the question around a return on investment. In May, BERK presented a landscape scan to the CSE leadership team. The landscape scan included staff and stakeholder interviews, input and ideas, providing a robust look at where others see the most utility in this department. This process gets us one step closer to identifying CSE's Theory of Change and organizational development roadmap. We anticipate having a finalized Theory of Change by August with the road mapping phase to begin in early fall. As this process matures CSE will continue to include various stakeholders in the planning process, including staff across the agency, THA leadership and Commissioners, community partners, and most importantly those we work in service to.

On the precipice of this retirement, CSE would like to offer a small note of “thanks” to Michael Mirra. Over the last 19 years Michael has had deep and lasting impacts on our community, THA staff and especially our clients. Among Michael’s many talents is his ability to turn nay-sayers into supporters. His adept ability and willingness to sincerely engage and listen to folks’ concerns, ideas and speculation has helped THA become an anchor institution in this community. Michael has been willing to do things (*ahem, Arlington Drive) other agencies would never contemplate because of the intense work, financial commitment, planning and community consultation processes, and systemic barriers. And, his drive has made Tacoma a better place to live for so many. Finally, Michael’s good humor has been a lifeline for me personally, reminding us all that laughter is the best way to maintain perspective and to not take ourselves too seriously. CSE will continue to work in Michael’s light, honoring his commitment to our clients and pursuing his vision. With the exception of Egg Creams, because those are gross 😊

Thank you for everything, Mr. Mirra. We’re individually and collectively better because of your participation in our lives.

3. DEPARTMENT UPDATES

3.1 Staffing

After a strong 19 years at THA, Mariya Yakimenko has decided it is time for her to retire so that she can spend some time with her family. In her time at THA, Mariya has been a steadfast advocate for families, particularly those looking for living-wage employment and homeownership. She has also provided a constant ear and support to staff across the board. CSE will not be the same without Mariya, but we are so excited she’s taking this step to be with her family and to enjoy the hard-earned fruits of her labor!

With Mariya’s departure and Stephanie Hopkins’ shift into the 2Gen program, Robert Lewis has been busy recruiting for two new Family Self-Sufficiency Case Workers. We hope to have an announcement of two new staff at the June Board of Commissioners meeting! More to come.

3.2 Program Updates

While CSE has several distinct programs that all aim to help residents and clients access the supports they want and need to meet their own goals, the department also provides opportunities for folks who may or may not be enrolled or engaged in specific

programs. One such opportunity is a recent collaboration between this department and THA's new Risk Manager, Karessa Bowman. Together, the two departments found funding from State Farm for emergency preparedness kits for each household in the portfolio! Kits will be assembled in June and distributed shortly thereafter. Each household will receive some basic supplies and information that will provide them with some resources during a potential emergency situation, hopefully increasing the odds that they'll be able to safely navigate any difficulty.

Program Supervisor, Kye Hillig, has also begun working with The Grand Cinema to bring movies into THA's properties. Kicking off this Summer, The Grand will host a movie night in Salishan where residents and families can safely watch a movie together, enjoying some snacks and community. The Salishan Association has been incredibly helpful and accommodating and we are looking forward to movie nights with The Grand!

Caroline Cabellon has led a new effort to partner with the City of Tacoma's new Youth Violence Reduction program. Caroline met with the City to understand the tenets of the program and to learn about the newly funded agencies who will carry out this important work. CSE staff were introduced to Consejo Counseling and Referral Services, who are the "boots on the ground" provider supporting Salishan. This new relationship will help THA better support families who are in crisis, ensuring that they have built in support to navigate scary and/or uncertain times.

Finally, CSE Engagement Specialist, Trish Mozo, participated in an outdoor client outreach event at the Family Investment Center. This outreach event purposefully coincided with the Farmer's Market taking place, ensuring maximum turn-out. CSE outreach focused primarily on the Economic Security for All (EcSA) initiative and the Paid Family Medical Leave (PFML) opportunities. EcSA helps to provide access to employment and education opportunities through partnership with Workforce Central and various other local non-profits. The Perigee Foundations has supported our efforts to teach residents and community members about this important health benefit, with a heavy focus on infants and healthy attachment. Flyers describing these programs, as well as other THA resources, were included in more than 150 grab bags. This event is a good example of the power of partnerships, and collocating services, making access as easy as possible.

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3.2.1 Family Self-Sufficiency Program (FSS)

After months of hard work and engagement, CSE submitted an updated FSS Action Plan to Housing and Urban Development (HUD) this month. This document will ensure our compliance with HUD expectations specific to FSS administration. Work to redesign the program will commence later this year, and will include thoughts and feedback from clients, staff and community stakeholders. More to come as that process begins!

3.2.2 Two Generational Program (2Gen)

Staff in the 2Gen program have been very busy and begun to enroll families into the program! Program staff have been working closely with Nick Tolley to launch a 2Gen website with information as well as fliers, both aimed at spreading the word and engaging families in the program. The team has continued conversations with several community partners who will play a key role in the program, offering services like parent/youth mentoring, tutoring and skill building support. Further, staff in the 2Gen program have developed and formalized a new partnership with the Tacoma-Pierce County Health Department. This partnership will allow families in the program to access and attend Triple P parenting classes at no charge. Triple P parenting classes offer practical tools and skills to help new and seasoned parents raise healthy, strong and resilient kids.

In mid-May staff met with the Foundation for Tacoma Students (FFTS) to discuss incorporating some technical assistance and evaluation for the 2Gen Program into THA's Education Project service contract with FFTS. FFTS showed strong interest in the program and is excited to partner together in this new way. A deeper relationship with FFTS will lead to stronger systemic alignment and will help THA better understand the impact of community supported Social Emotional Learning, which is a brand-new field of research.

3.2.3 Child Savings Account Program

CSE Staff finalized and submitted CSA's redesigned program rules and proposal to THA leadership for review and approval. Upon approval, the CSA team will begin implementation of its expansion plan, including revamping marketing materials and preparing families for the November

open-enrollment period. Staff will brief the Board of Commissioners Education Committee about the proposal at the June committee meeting.

3.2.5 By the Numbers

Kendra Peischel has continued her work with THA's IT department and a third-party support team to rework the Open Door database to better assist in capturing pertinent, accurate, and useful data.

Department leadership has continued to clarify key metrics and data points that will better illuminate the work done, and impact of this department.

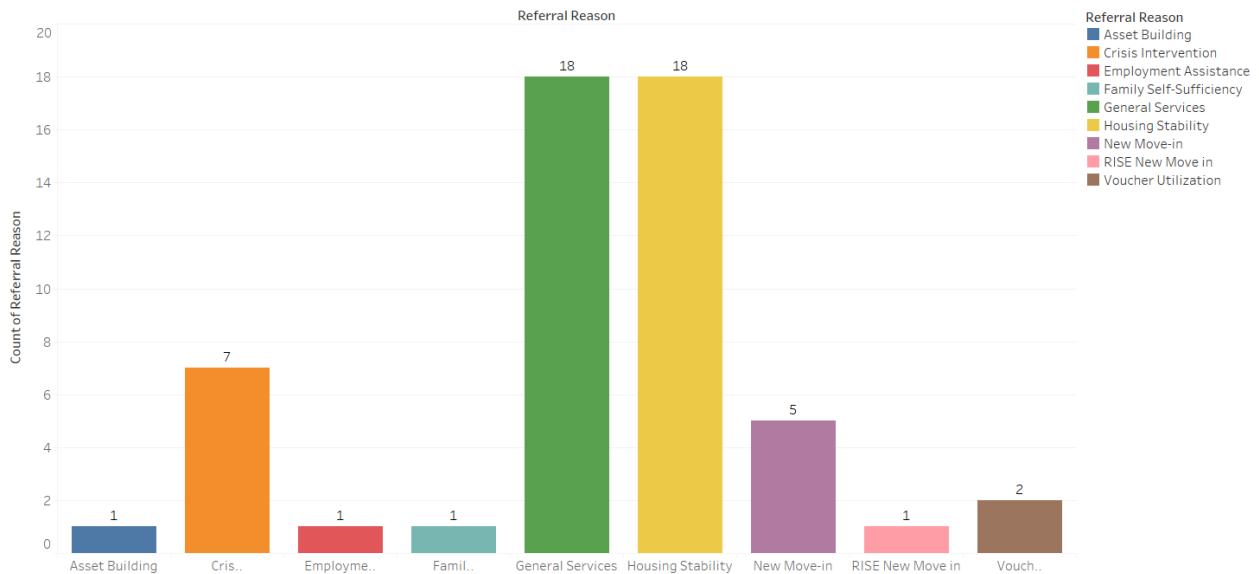
Kendra will continue to lead this work, and will bring in the Policy, Innovation and Evaluation department in the coming months to finalize near-term and long-term metrics. This framework will better show the relationship between staff outputs and outcomes, and more specifically allow us to analyze how staff can/should best spend their time. Ultimately, better data will not only show the work done, but will inform future work and help to refine our service provision in perpetuity.

The charts below show how many resource connections staff made in the month of May, and the numbers and types of referrals received by CSE from the East Portfolio, voucher holders, the West Portfolio. Each referral received is assigned to a Case Worker who then works with residents/voucher holders to address the need expressed in the referral along with other needs the family may express. Some referrals result in limited support aimed at addressing the referral issue, and others turn into long-term support. The bottom chart shows the number of external resource connections staff made on behalf of residents and voucher holders. The length of engagement is determined largely by residents, with Case Workers offering support for a variety of needs.

Referrals Received by CSE
May 2021

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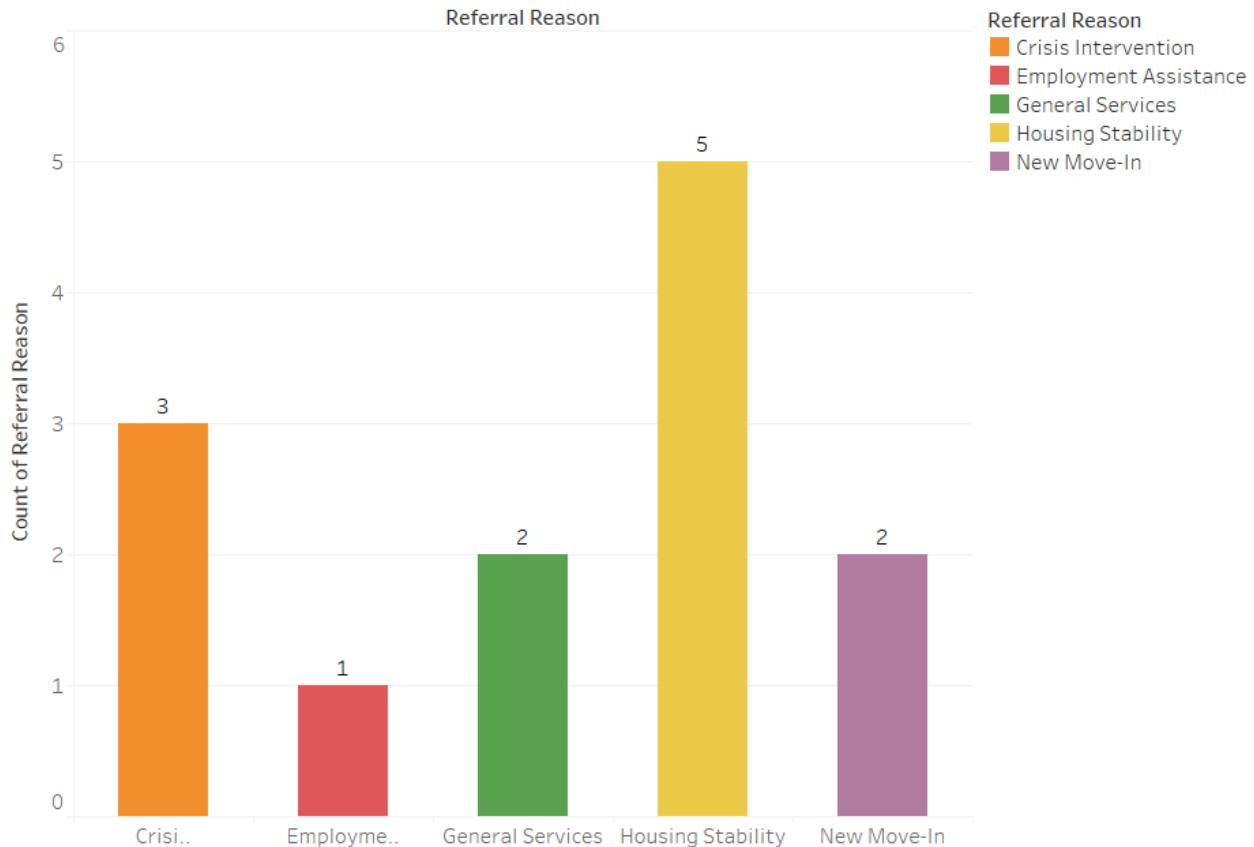
Sheet 1



Count of Referral Reason for each Referral Reason. Color shows details about Referral Reason. The data is filtered on Date Referred and West/East/Voucher. The Date Referred filter ranges from 5/1/2021 to 5/31/2021. The West/East/Voucher filter keeps multiple members.

Referrals from East Portfolio

Referrals Received by CSE
May 2021

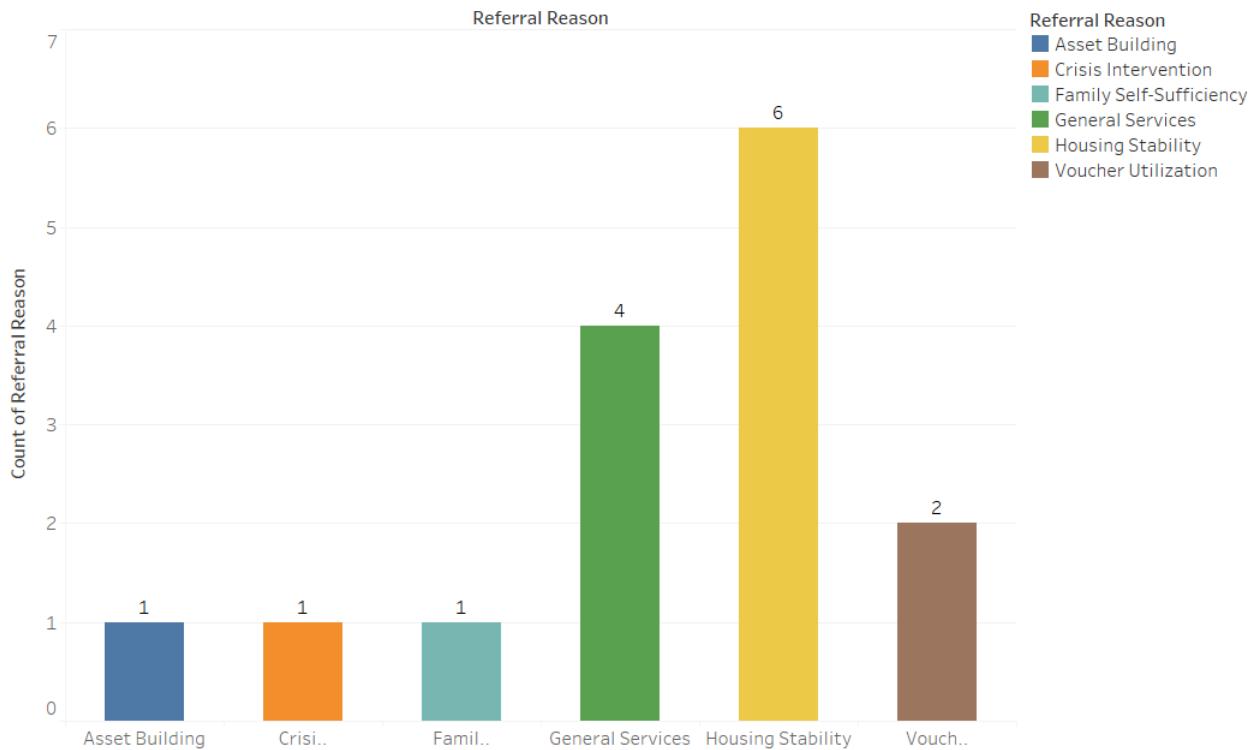


Count of Referral Reason for each Referral Reason. Color shows details about Referral Reason. The data is filtered on Date Referred and West/East/Voucher. The Date Referred filter ranges from 5/1/2021 to 5/31/2021. The West/East/Voucher filter keeps East Portfolio.

Referrals Received from Rental Assistance

Referrals Received by CSE

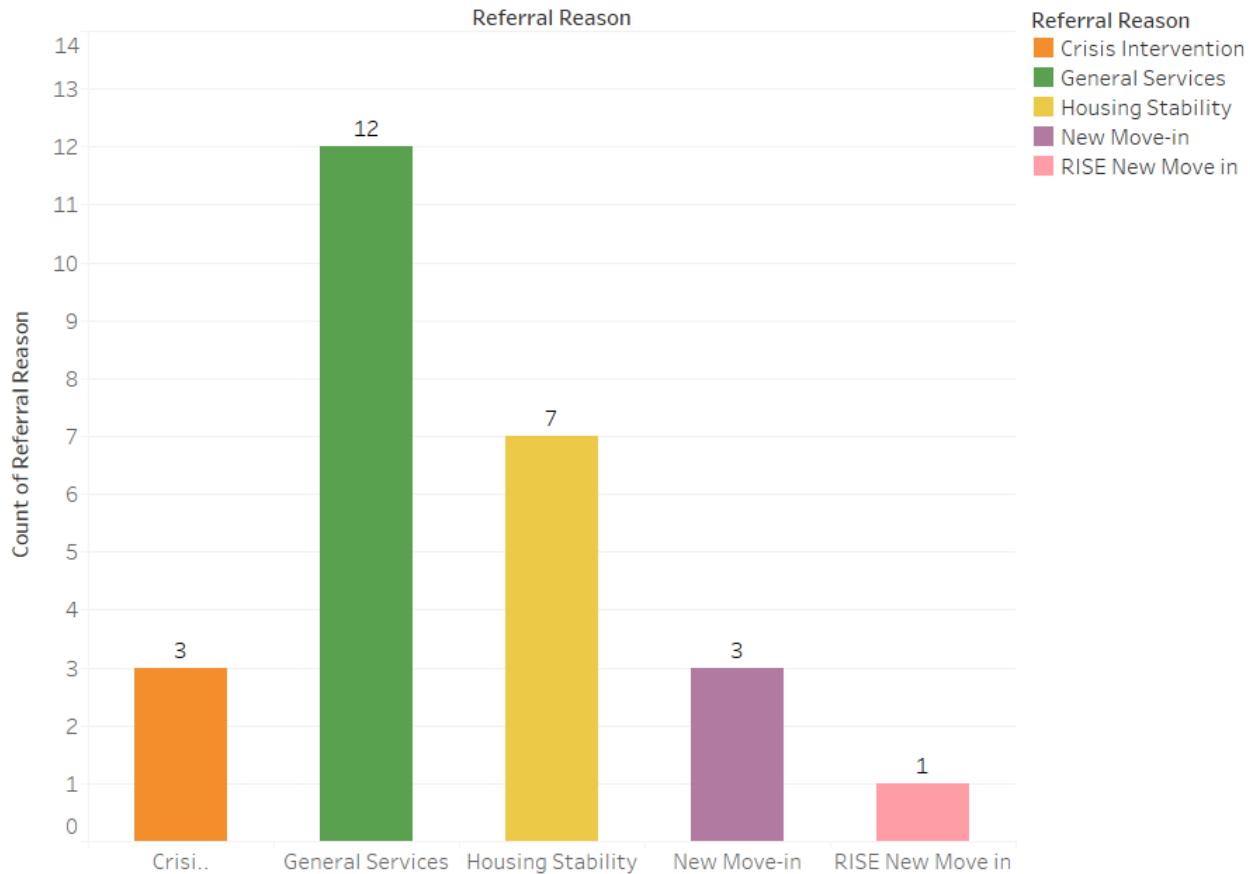
May 2021



Referrals Received from West Portfolio

Referrals Received by CSE

May 2021



Count of Referral Reason for each Referral Reason. Color shows details about Referral Reason. The data is filtered on Date Referred and West/East/Voucher. The Date Referred filter ranges from 5/1/2021 to 5/31/2021. The West/East/Voucher filter keeps West Portfolio.

All Referrals Received by CSE 2021

Referral Reason	Date Referred	
	May	Grand Total
Asset Building	1	4
Assistance with Rea..		4
Behavioral Health		9
Crisis Intervention	7	7
Employment Assista..	1	1
Employment Relate..		21
Family Self-Sufficien..	1	20
General Services	18	18
Housing Resources		1
Housing Stability	18	75
New Move-In	5	14
Relocation		10
Rental Assistance		27
Resident Support		22
RISE New Move in	1	36
Salishan New Move in		7
Security Deposit Ass..		13
Utility Assistance		3
Voucher Utilization	2	27
Voucher Utilization (..		1
Grand Total	54	320

Count of Referral Reason broken down by Date Referred Month vs. Referral Reason. The view is filtered on Referral Reason, which excludes Housing Stabilty.

RESOURCE CONNECTIONS

2021 Resource Connections

Referral Category	May 2021	2021 Totals
Adult Education		5
Asset Building	11	35
Behavioral Health		7
Employment Assistance		32
Food Assistance	416	1,994
FSS		1
Legal Services	1	9
Pierce County Health Department	1	1
Rental Assistance	14	22
Resident Assistance Programs	18	133
Tax Assistance		1
Transportations Assistance		1
Utility Assistance	3	4
Grand Total	464	2,245

Count of Referral Category broken down by External Referral: Created Date (MY) vs. Referral Category.



TACOMA HOUSING AUTHORITY

RENTAL ASSISTANCE



TACOMA HOUSING AUTHORITY

DATE: June 23, 2021

TO: THA Board of Commissioners

FROM: Aley Thompson
Interim Director of Rental Assistance

RE: Department Monthly Board Report

1. STRATEGIC OBJECTIVE: HOUSING AND SUPPORTIVE SERVICES

Tacoma Housing Authority (THA) will provide high-quality housing, rental assistance, and supportive services. Its supportive services will help people succeed as tenants, parents, students, wage earners and builders of assets who can live without assistance. It will focus this assistance to meet the greatest need.

2. DIRECTOR'S COMMENT

We have some exciting and bittersweet staffing news to share. Cathy Forsland a nearly 10-year THA employee retired this month. We are grateful for her service and thankful we were able to celebrate her contributions with our THA family virtually. We also welcome Fernando Ruiz to the team as our newest Program Manager. He comes to us with strong experience from Catholic Community Services, he has a great sense of humor and is eager to get to work! Over the next several weeks we will be welcoming a new group of Office Assistants (due to promotions). The first is Lacie Ricci who joined us this week. Alexandria Alcantar will be joining us mid-month and Estelle Kim will start in early July.

Last month, THA received notification from Housing and Urban Development (HUD) regarding our allocation of Emergency Housing Vouchers (EHV). We will receive 134 of these time limited vouchers. We accepted this allocation and asked for 134 more. Pierce County Housing Authority also received an allocation of these vouchers. We are collaborating with the Pierce County Continuum of Care and Pierce County Housing Authority to develop a plan to utilize these vouchers and provide services for application supports and housing navigation. Our Special Programs team added another staff member in anticipation of these vouchers, and they are trying to work ahead to free up extra capacity to begin processing referrals for EHV's once the program is live in July.

We continue to monitor Pierce County's late rent and utilities assistance program. We are hearing that our clients and some of THA tenants are slowly beginning to receive assistance. Many are receiving prospective rental assistance payments. Our Landlord Engagement Specialist continues to encourage patience among our clients and landlord partners as the County has assured the community that they are not running out of funding at this point.

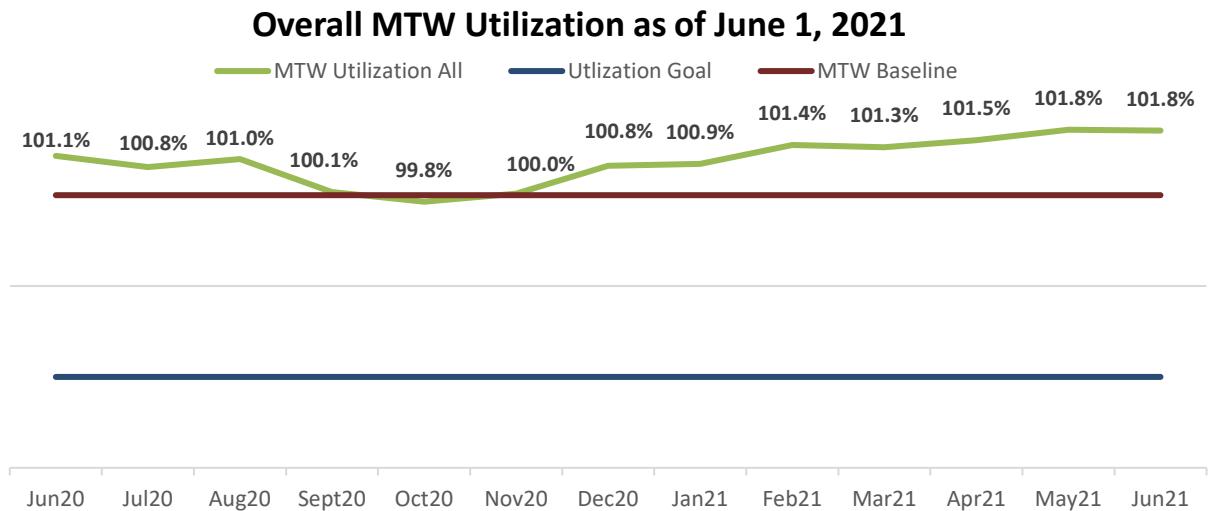
We've mentioned in previous reports that HUD has some concerns about our utilization. HUD's report does not account for over 400 local program units we subsidize through our Rapid Rehousing contributions or our Property Based Subsidy program. We will be meeting with HUD on June 15, 2021, to discuss their concerns.

We are grateful for Real Estate Development (RED) and their leadership on the 902 remodel project. Construction has begun! Our skeleton and training crews are operating out of the second floor at 902. As we've brought on more staff and transitioned team members into new roles we anticipate the need for additional in person training. The Emergency Operations Committee (EOC) has maintained a 25% occupancy level at THA properties and will reevaluate building capacities this month.

3. RENTAL ASSISTANCE DEPARTMENT REPORTS

3.1 Overall Utilization

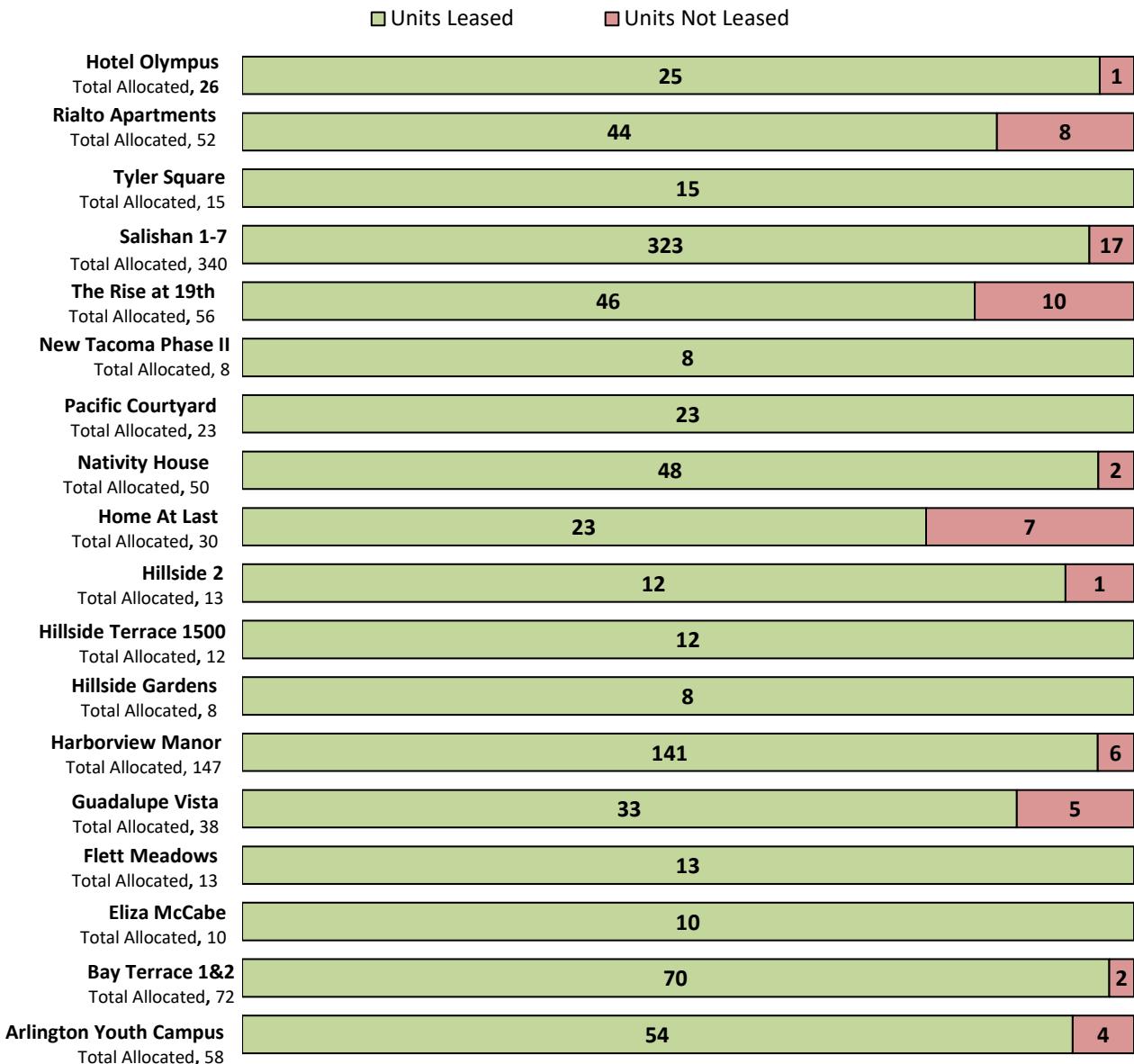
The overall Housing Choice Voucher utilization is reported at 101.8% as of June 1, 2021. THA receives a report on utilization quarterly for Rapid Rehousing (RRH) and Property Based Subsidies (PBS). Therefore, averages are used to forecast utilization to the current date for these specific programs. As new information is reported for both RRH and PBS, this utilization report is updated accordingly.



3.2 Project Based Vouchers

THA continues to have strong utilization with project-based vouchers. We have worked hard with YWCA Home at Last staff to voucher and lease up all 30 units by their May 31st deadline. We accomplished that goal however the numbers will not be reflected until all Housing Assistance Program (HAP) contracts are created. Guadalupe Vista has submitted referrals to fill 4 of their vacancies. We still plan to remove 1 unit from the contract due to the unit being occupied by an unsubsidized household who cannot be evicted due to the Moratorium. Rialto saw an increase in vacancies and has identified households for those units. THA staff are waiting for completed paperwork to start processing. Harborview has also seen an increase in vacancies but also sent referrals quickly to fill those vacancies.

Project Based Voucher Utilization as of June 2021



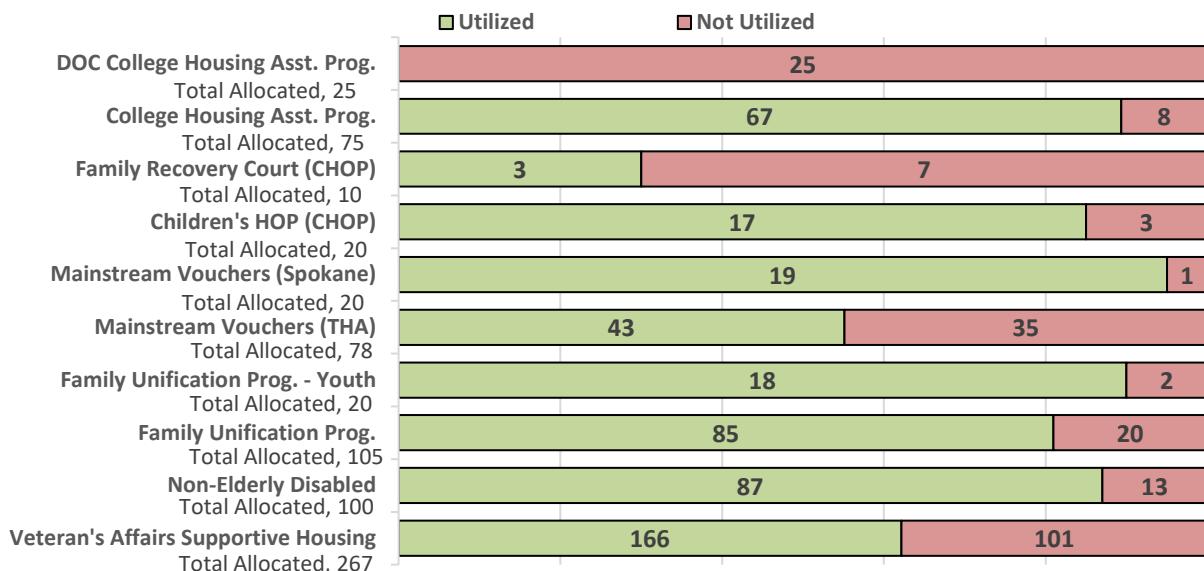
3.3 Special Programs & Property Based Subsidies

Below is a breakdown of the utilization of THA's special programs. The charts below include shoppers for each program. Our special programs team is preparing for the upcoming Emergency Housing (EHV) vouchers which has prompted the addition of one more Housing Specialist to our Special Programs Team. We continue to get referrals for the Mainstream program but still have several shoppers. Our Non-Elderly Disabled (NED) program had some turnover, and we are working with DSHS (Department of Social and Health Services) to send referrals to fill those vouchers. DSHS is actively working with skilled nursing facilities to identify eligible households. DSHS continues to work on identifying FRC eligible households through the Family Recovery Court.

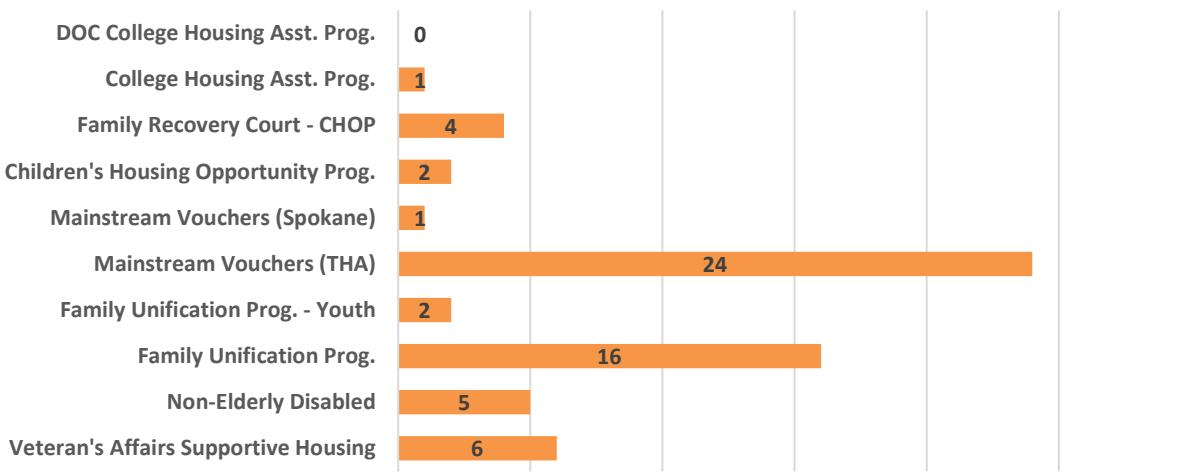
The Veteran's Affairs (VA) has sent a Letter of Support to convert 15 HUD-VASH tenant-based vouchers to project-based vouchers for the Korean Women's Association project in downtown Tacoma at 15th & Tacoma Ave. The projected completion date is February 2023. The VA continues to utilize SSVF for tenant based VASH vouchers however referrals are not adequate. The VA and THA continue to meet regularly to address the lack of referrals.

The Department of Corrections program with Tacoma Community College (TCC) continues to hold 25 vouchers for use. This program is still under development and vouchers have not been utilized. Please refer to periodic updates from PIE for the status of this program's development.

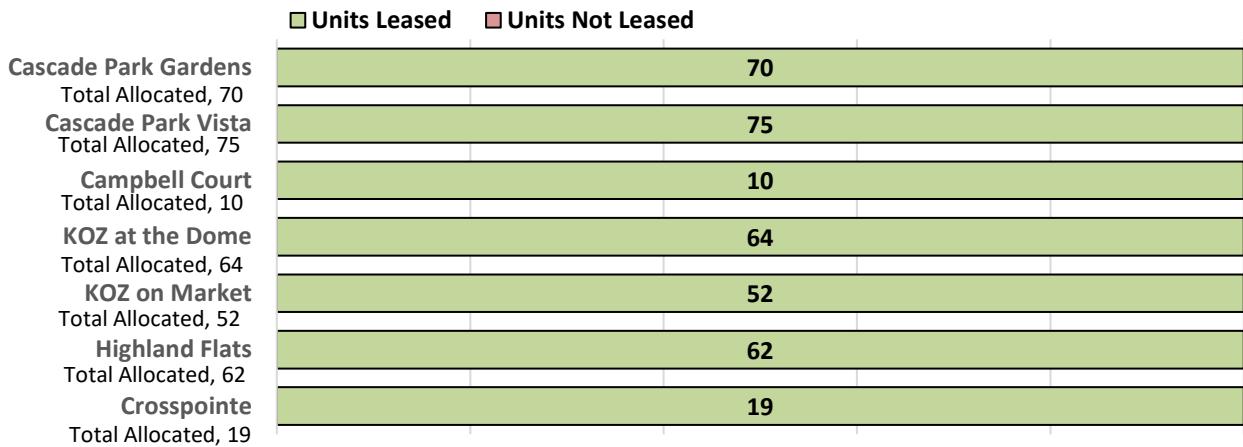
Special Program Utilization as of June 2021



Special Program Shoppers as of June 2021



Property Based Subsidy Utilization as of Q1 Report: April 2021



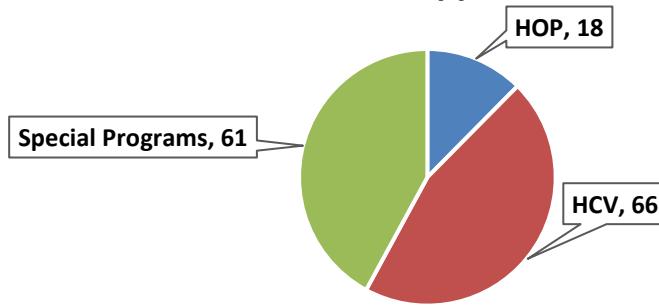
THA has partnerships with four Property Based Subsidy owners representing more than 350 units across seven properties. Our Compliance team continues to conduct 2020 file audits.

3.4 Shoppers Report

The chart provided below shows a breakdown of the number of current shoppers by program. A shopper is a client who has a voucher and is looking for a unit. Clients may or may not be housed during this process. The shoppers in the chart below include clients new to the program from the waiting list and clients moving from one unit to another.

As of June 2021, there are 145 total clients shopping. These numbers will increase with the addition of new VASH and EHV vouchers. So far this year, the majority of those housed were able to find a unit in under 50 days (76%). Some of our special program participants have bigger barriers, and it typically takes them longer to secure housing.

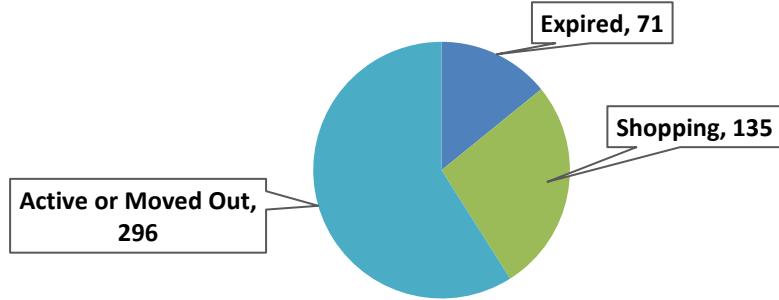
Current Number of Shoppers as of June 2021



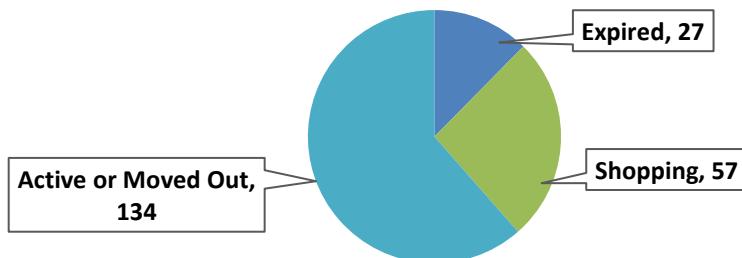
Over the past year (June 2020 – May 2021), 502 tenant-based vouchers were issued including 218 issued to new participants.

- 59% of all households issued a voucher in the past year found housing.
- 61% of new to program households secured housing.

Voucher Status for All Vouchers Issued In the Past Year: 502



Voucher Status for New Admission Vouchers Issued In the Past Year: 218



3.5 Leasing & Waitlist Management

There are about 1,700 households on THA's Consolidated Waitlist. THA is not currently offering Housing Opportunity Program (HOP) vouchers to households on the waitlist (see our utilization numbers in section 3.1). Leasing continues to pull households to fill vacancies within THA's portfolio.

Leasing and Property Management will continue to use the moving cost assistance program throughout 2021 to incentivize over/under housed households to relocate. As households participate in the incentive program, we anticipate that Leasing will be busy working to help backfill units in the portfolio.

During the second half of this year, the Leasing team will partner with the Opendoor team to revisit the applicant portal project to improve communications with its customers. This work is ongoing.

3.6 Inspections

The Inspections team continues to conduct initial inspections in unoccupied units. We still have a small backlog of inspections due to the pandemic, and we're taking steps to reduce them using the authority we presently have, implementing Coronavirus HUD waivers and the recently approved changes to our MTW plan. The team continues to work to implement the "significant changes" to THA's 2021 MTW Plan to:

- defer HQS inspections until the next regular inspection date.
- accept self-certifications from owners for initial and annual inspections.
- adopt alternative methods of inspections such as remote video inspections.

- implement triennial HQS inspections for THA's Portfolio as these units are subject to regular inspections conducted by Property Management.

We are wrapping up the owner self-certifications that were sent to over 400 property owners. 368 were completed. The remaining 32 will be added to the inspection schedule in the coming month.

Letters were sent to clients and landlords last week letting them know that inspections will be resuming and what their scheduled inspection date is. Our first regular inspections since March 2020 will begin on June 21st. The priority will be addressing delinquent inspections and then inspections that are coming due.

3.7 Late Rent

Pierce County and the City of Tacoma deployed a late rent program to help tenants and property owners pay past due rent and utilities. This is "round 2" of the rental assistance program THA helped to administer at the end of 2020. THA will not administer the program but will market its availability early and often to clients, tenants, and housing provider partners. THA will be able to receive funds as a property owner if Portfolio tenants apply for help.

3.8 Landlord Engagement

THA hosted a virtual legislative update with Tacoma Probono's Housing Justice Project, Landlord Solutions, to give THA Housing Providers an update about new landlord-tenant laws.

The Housing Connector was awarded the contract to assist our Mainstream and CHAP participants. The contract will start July 1st and will help 50 households locate housing using the Zillow platform. Participants will have access to funds that help with move-in costs. In addition, housing providers will have risk mitigation funds for utilizing "relaxed screening criteria" to house participants with high barriers and additional community supports.

We continue to partner with the Landlord Liaison Program at Associated Ministries, Pierce County Housing Authority, Vadis, Sound Outreach, and Spinnaker Property Management to offer monthly Renter's Readiness classes and certifications.

The LES also started hosting a bi-Monthly Housing Provider Orientation. Topics covered during the orientation are, Basics of the Housing Choice and Housing Opportunity Voucher, Participant Obligations, Request for Tenancy Approval Packets, Inspection Process, Leasing Information, and more.



TACOMA HOUSING AUTHORITY

PROPERTY MANAGEMENT



TACOMA HOUSING AUTHORITY

Date: June 23, 2021

To: THA Board of Commissioners

From: Frankie Johnson
Director of Property Management

Re: Property Management Monthly Board Report

1. STRATEGIC OBJECTIVE

Tacoma Housing Authority (THA) will manage its properties so they are safe, efficient to operate, good neighbors, attractive assets to their neighborhoods and places where people are happy to live.

2. DIRECTOR'S COMMENTS

Property Management staff has stayed busy this month, as the team continues their fearless work to keep our Portfolio looking amazing. Although we remain in the middle of COVID, this has not hindered our ability to present a healthy and thriving Portfolio.

Improvements continue across all fronts, when it comes to recertifications, grounds, turns, leasing, property maintenance, tenant support, and everything in between. I would like to extend a huge THANK YOU to the team for everything they have done throughout the pandemic and will continue to do for our properties and tenants.

The team is growing! We would like to welcome two new Property Specialists to our Admin team, Hollie Swanson and Natasha Djordjevic and William Green as our new maintenance tech.

Hollie, who provided administrative support at Salishan as the Office Assistant, was promoted as our new Property Specialist working with our Leasing team. Natasha joined THA as a Property Specialist for North G, North K and Ludwig properties. We have also welcomed William Green as our new COVID hire Maintenance Tech. William will be providing support for Bay Terrace and Hillside Terrace team.

This has been a busy time for many of our specialists in our West Portfolio, Family and Senior/Disabled properties. Annual certifications have been completed for the RENEW Tacoma portfolio. This is especially notable since the certifications were completed remotely for the first time in our portfolio. The experience has opened up other options and possibilities for the team to look online certs with a positive perspective.

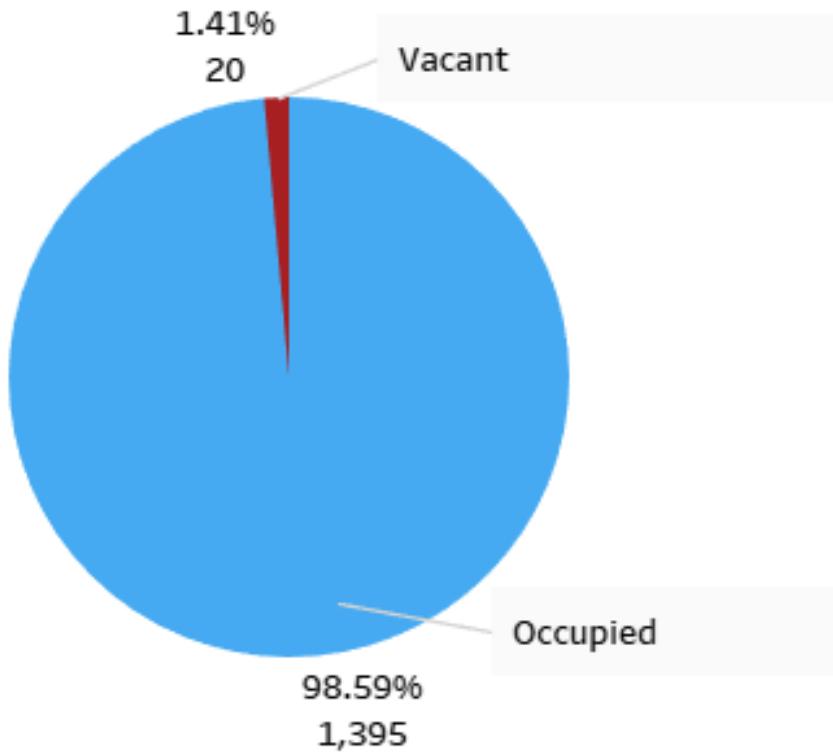
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As we pass the finish line of the lease up of the Arlington and the Rise, now the hard work begins. Staff worked tirelessly on the upload of first-year files and leases for our investors. The compliance of these properties begins now and will continue for the next 15 years.

As we look ahead to the end of the eviction moratorium and the lifting of state restrictions, property management is focused on looking ahead. This month, our admin team has reached out to hundreds of families who are arrears with rent to offer assistance in applying for Pierce County Late Rent assistance funds. We hope to ensure that every family needing help will have an opportunity to access and receive assistance. We will provide statistics as they become available.

Finally, our Maintenance team is preparing to restart their preventative maintenance unit inspections. The strategy is to begin with the units who have not reported work orders during the pandemic. This will give us an opportunity to look in at the units that we have not seen in over a year to check systems for health and safety concerns. The initial approach with maintenance reviewing the unit systems and safety while the managers participate and address housekeeping issues or other tenant concerns, will provide the full support for the household. All of this work for the department outlines our effort to move forward, full steam ahead, to a more familiar pre COVID state in the ‘new normal’.

3. OCCUPANCY OVERVIEW



3.1 Occupancy

For the month of May

Unit Occupancy is reported as of the first day of the month. The chart above reflects THA's portfolio for the month of **May** with an occupancy percentage of 99 %. THA has a total of 22 Properties in its portfolio with a total of 1,415 units.

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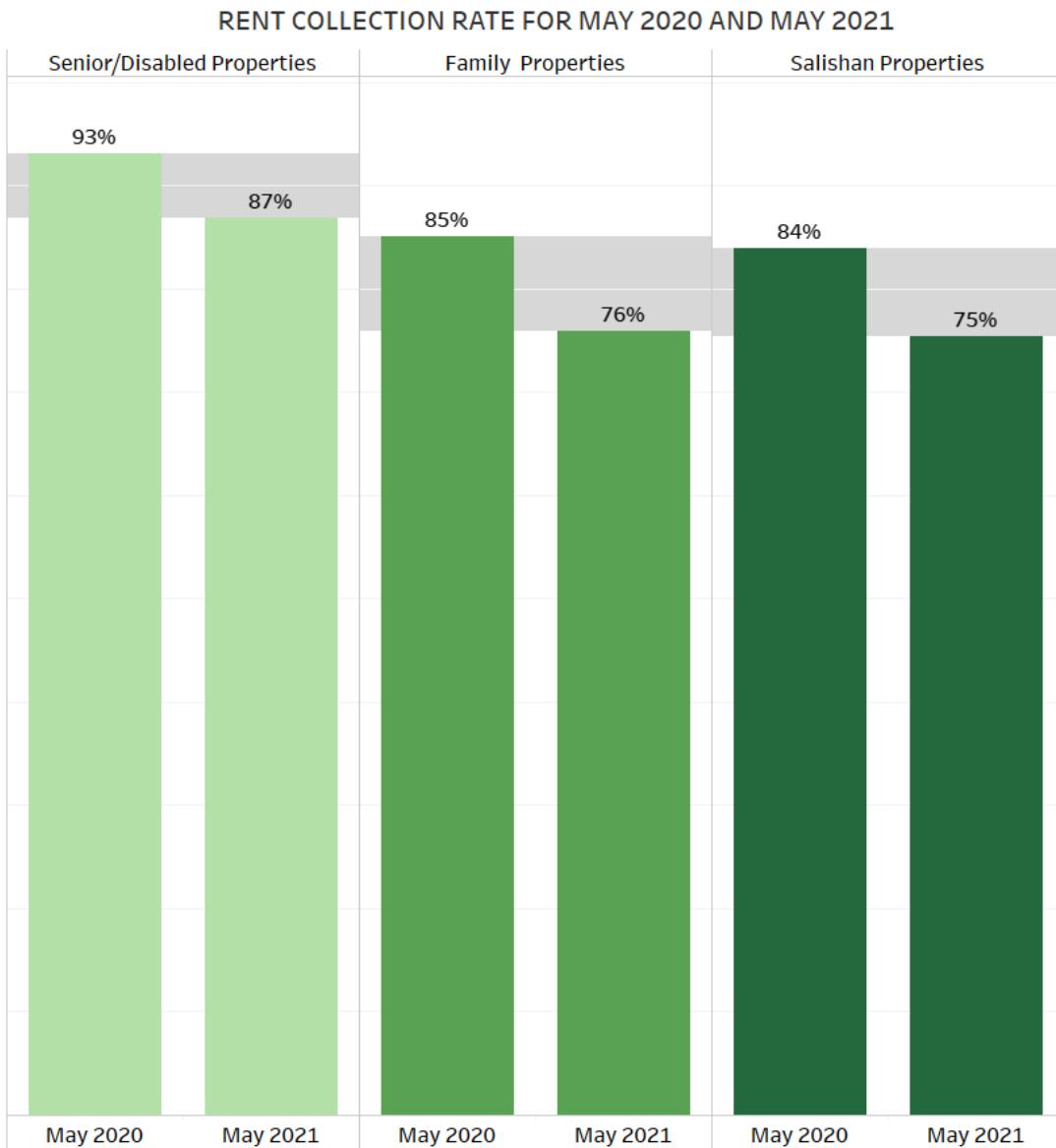


The portfolio has maintained a consistent average occupancy rate of 98.63% over the last 5 months. This is especially notable during the periods of Stay Home and Stage 1 for THA.

Other PHAs are reported to be struggling in this area, some with occupancy in the mid to high 70s.

These numbers reflect the dedication by the PM staff to their work and to our mission to house our clients, even under extreme circumstances.

3.2 Tenant Rent Payments

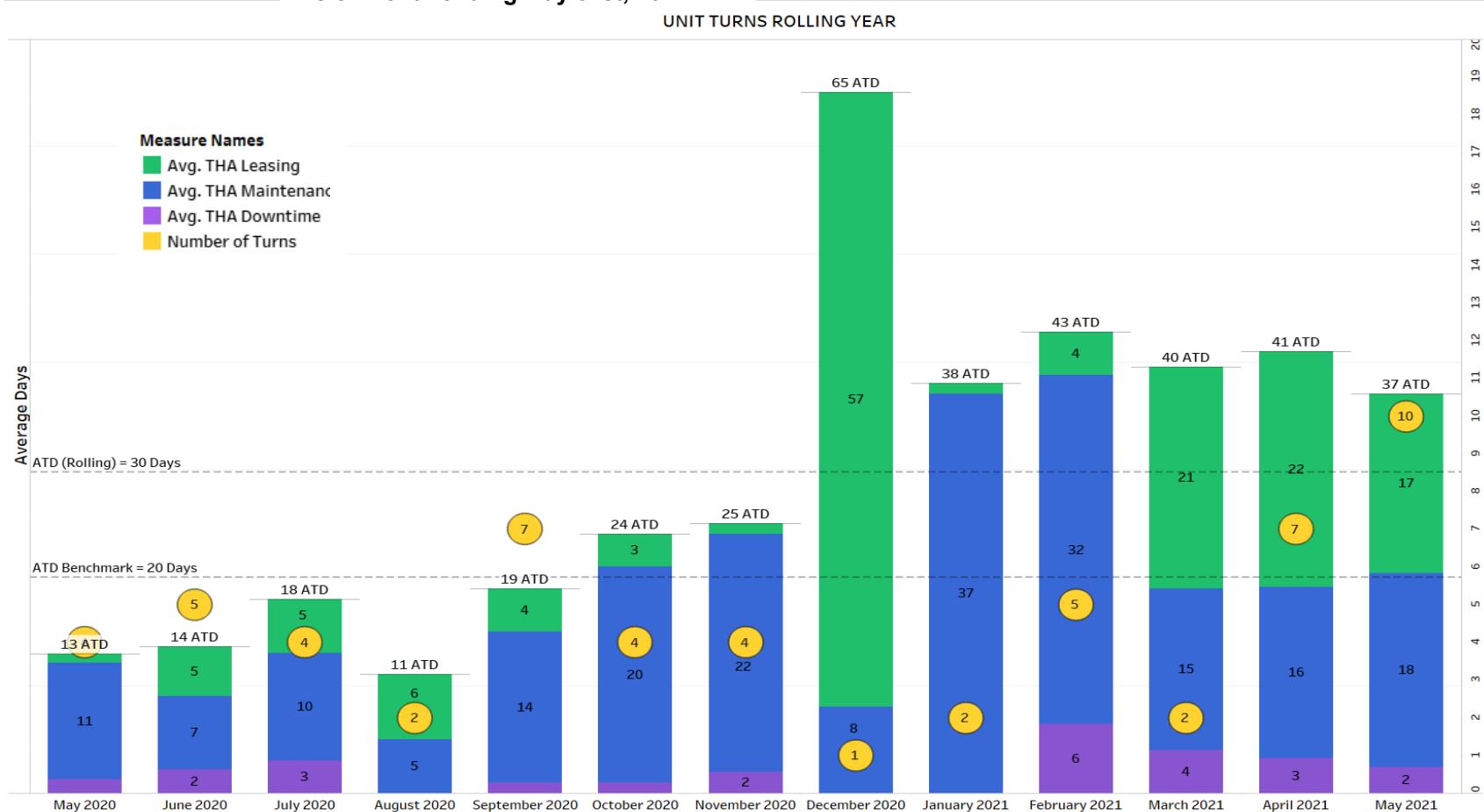


The Rent Collection chart compares May 2020 and May 2021 rent payment averages through the last day of each reporting month by property group. If a unit is vacated and occupied by a new tenant within the same month, the chart will capture both the inactive (vacated tenant) and active ledger (new tenant) payments.

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3.3 Vacant Unit Turn Status

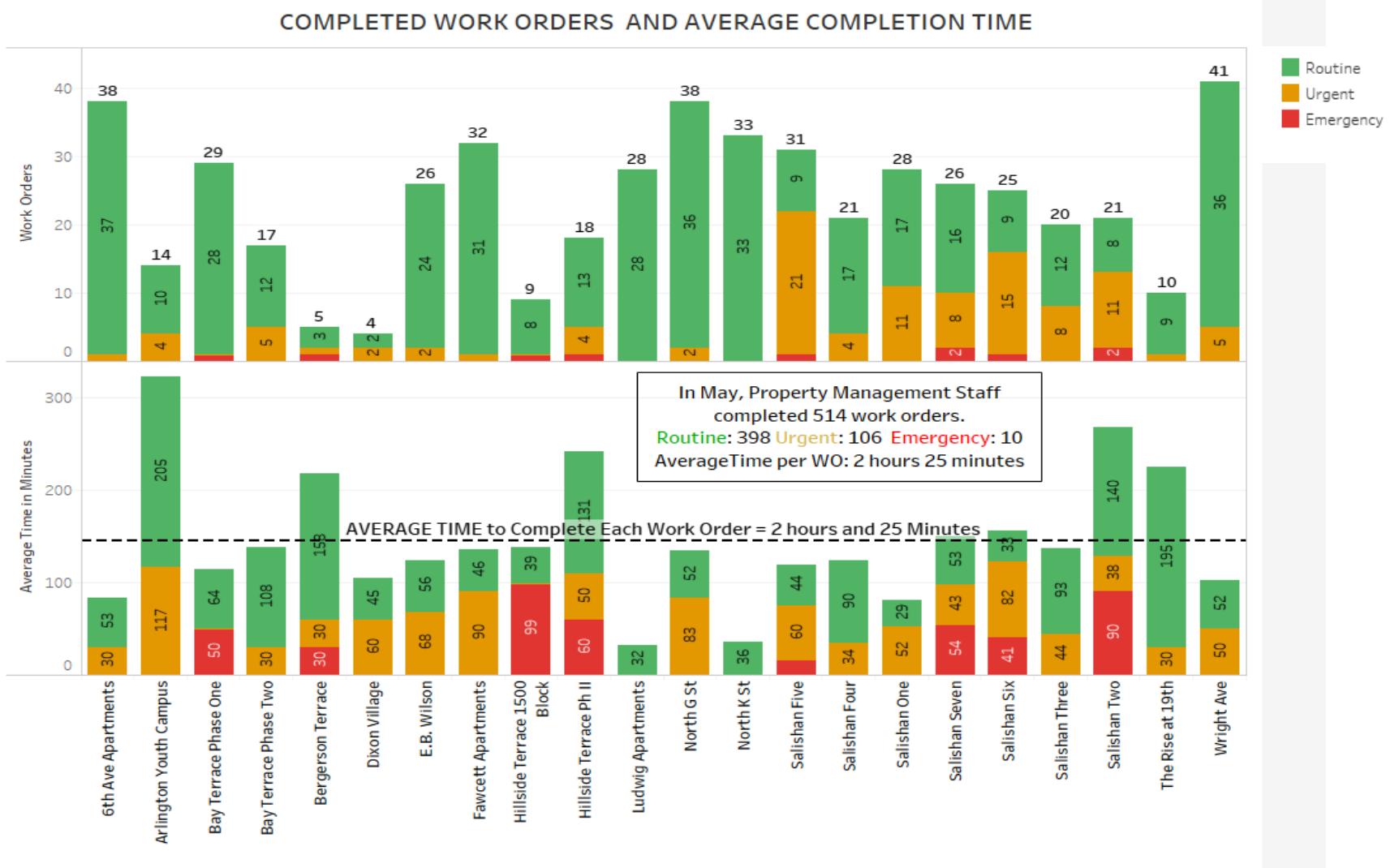
As of month ending May 31st, 2021



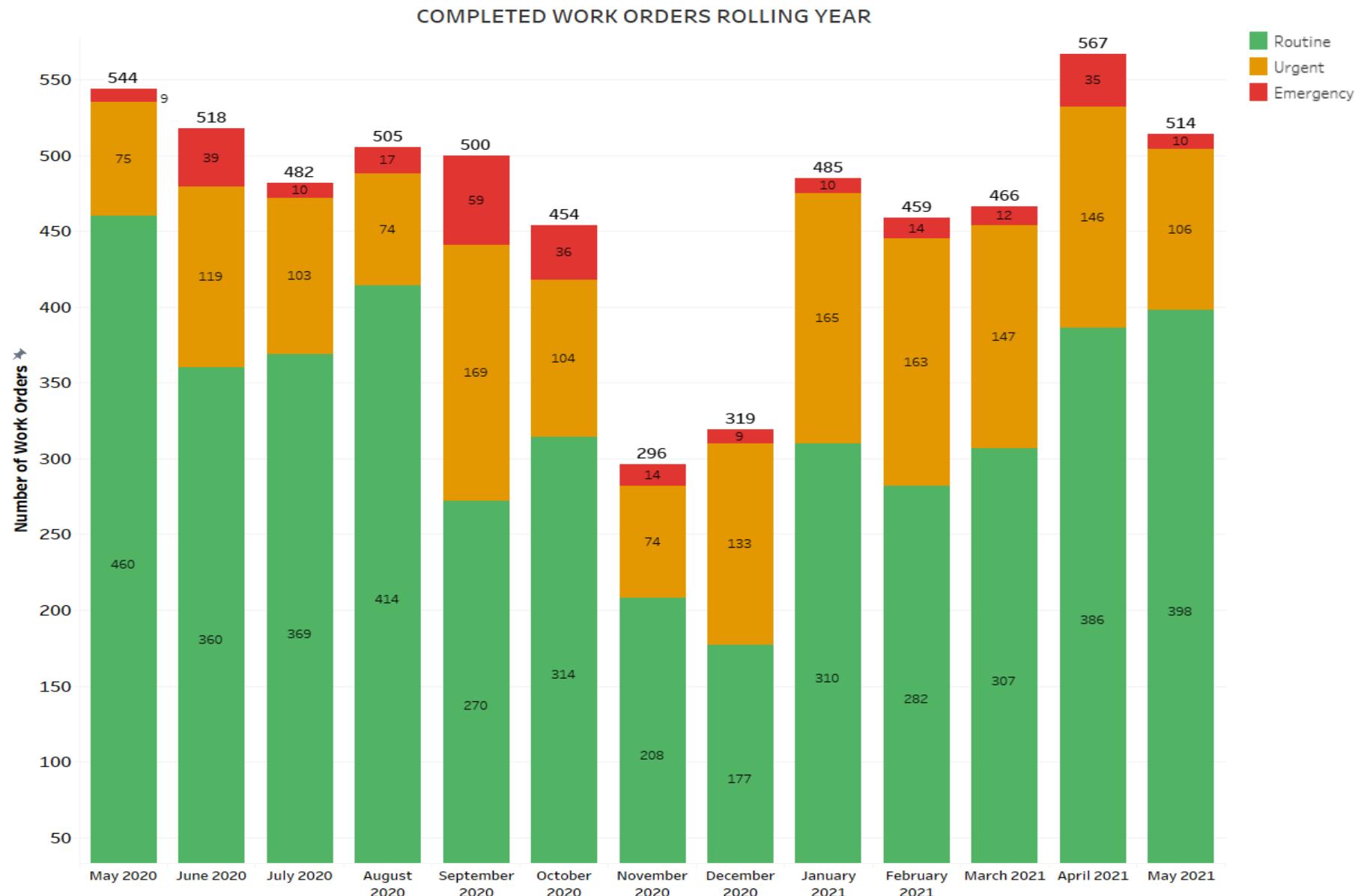
This data reflects the collective efforts of the Turn and Leasing teams efforts to maintain a monthly benchmark of 20 days or less. The turn average for the maintenance portion of unit turn process for May was 18 days. Leasing struggled this month with a 17-day average which is a slight increase from the previous month.

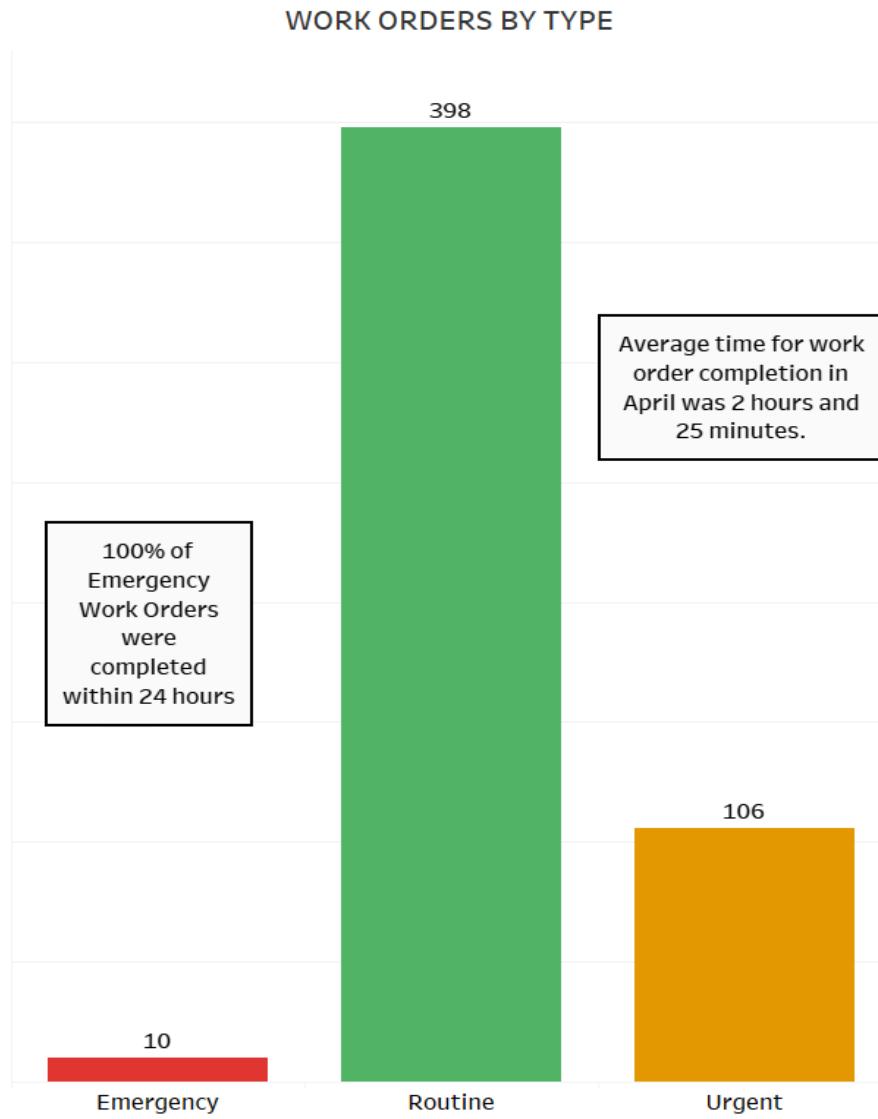
Notwithstanding the challenges of closed offices, teleworking and social distancing, the teams worked hard to quickly house families as soon as possible. Property Management accomplished a rolling average turn time of 30 days.

3.4 Work Orders



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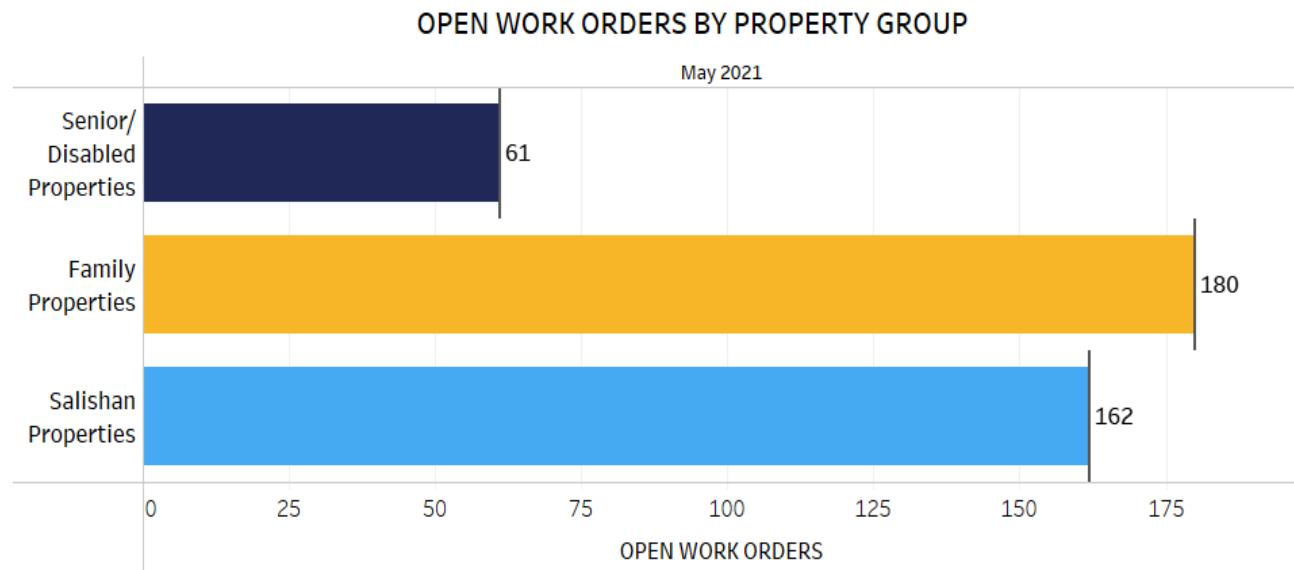
In the month of May, 100% of the 10 emergency work orders were completed within 24 hours and 106 urgent work orders completed within 72 hours. The average work order completion time across the portfolio decreased slightly this month from 2 hours and 29 minutes to 2 hours and 25 minutes.

We experienced a decrease in the number of emergency work orders this month. PM continues to hold all routine work orders, except for units needing emergent and urgent work. We are working on a plan for addressing routine work orders, which is contingent on COVID status.

Processes that PM has implemented in effort to improve customer service and safety during Coronavirus pandemic are:

- Prioritize emergency and urgent work orders during the Coronavirus pandemic until the State's Safe Start Plan and THA's Re-opening Stages permit us to continue with other unit routine work orders. Maintenance will assess all routine work order requests to confirm or re-determine priority status;
- Prior to entering any unit, staff will ask appropriate general health questions of the occupant to allow for an assessment of risk and wear appropriate PPE to further limit risk to self and others.
- Communicate any potential delays with procurement due to limits on availability of stock;
- Close work orders within 48 hours of completion; and
- Temporary HOLD on routine work orders until further notice.

The chart below outlines a total of 403 outstanding routine work orders within our 22 properties. This is a 44% increase of open work orders from last month. Some aged open work orders may rise to an urgent level which would explain a decrease or fluctuation from month to month.





TACOMA HOUSING AUTHORITY

REAL ESTATE DEVELOPMENT



TACOMA HOUSING AUTHORITY

DATE: June 23, 2021
TO: THA Board of Commissioners
FROM: Kathy McCormick
Director of Real Estate Development
RE: Real Estate Development Department Monthly Report

1. SALISHAN/HOPE VI

1.1. Phase II Construction

Area 2A, Community Core Development

Staff continue to explore options and partnerships to complete the Salishan Core. There are no immediate plans at this time.

Sale of Salishan Lots

Tacoma Housing Authority (THA) sold the last seven residential lots to TAC Build LLC. The transaction closed in July 2020. They started doing some infrastructure work in late 2020. Vertical construction will commence once permits have been received.

2. NEW DEVELOPMENT

2.1. The Rise on 19th Redevelopment

Scope

The redevelopment of 1800 Hillside Terrace is a single building with 4-stories of affordable housing. The housing units are programmed as follows:

The Rise on 19th			
	1-BR	2-BR	TOTAL
Low Income	24	12	36
Homeless	8	6	14
Disabled	8	6	14
TOTAL	40	24	64

A set-a-side of 20% of the units will serve individuals with disabilities and an additional 20% set-a-side will serve individuals and small families experiencing homelessness.

Financing

The total development cost was budgeted at \$22,285,582.

On June 26, 2019, the closing for financing for The Rise was completed.

The Rise was completed below the development budget with a projected savings of \$1MM+/-.

Staff is working with BFIM on how to set up increased property reserves, a pay down on the primary mortgage with Heritage Bank and an increase in Developer Fee paid to THA will the savings.

Construction

Marpac mobilized beginning July 1, 2019. The project is 100% complete. At substantial completion on December 24, 2020, staff received a 180 day temporary Certificate of Occupancy while staff and the City resolve ADA curb ramp installation issues in the right-of-way.

Leasing

Leasing is complete with 64 residents occupying the property. Leasing staff is reporting the following leasing details. Leasing staff accomplished 100% of the units leased by May 1, 2021.

Lease Up Progress Table

Waitlist Group	Processing	Pre-approved	Moved In
Consolidated Waitlist	0	0	28
Reasonable Accommodation	0	0	7
Over/Under housed	0	0	11
VA – Homeless	0	0	18
Total	0	0	64

3. OTHER PROJECTS

3.1. James Center North

3.1.1. Background

THA purchased James Center North (JCN) because it offers a unique opportunity to acquire a property that is attractive to public and private developers. It is positioned to be redeveloped to provide both market rate and affordable rental housing in a mixed-use setting that is adjacent to a transit center and within walking distance of grocery stores, parks and Tacoma Community College (TCC).

3.1.2. Capital Improvements

Minor capital repairs will be completed on an as needed basis to keep the property functioning. The goal to limit the capital investment into the buildings prior to redevelopment is being re-evaluated in light of THA's agreement to keep some of the buildings leased for another five to ten years. Electrical access has been installed to allow food trucks to operate on a semi-permanent basis.

3.1.3. Leasing

Although CB Danforth continues to market the available property, COVID has affected leasing prospects. CB Danforth is surveying current tenants at the property

to determine if they will have challenges paying rent, plan to seek a loan or funding through CARES and if not, why not. Four (4) current tenants are delinquent on rent for various amounts. Of those four, all have indicated they have applied for and expect to receive, COVID-related rent assistance from state or federal funds. Most businesses at James Center are small retailers, services and restaurants who are adversely impacted by the pandemic. Property Management and leasing staff continue to stay in close contact with all tenants and are prepared to work with them for repayment options.

Shoebox NW (Jimmy John's) has stated they will cease to attempt sub leasing the property since vacating it prior to COVID closures. They will also cease to pay rent. This is a lease violation and the tenant is still responsible for rent. Legal action is in process.

The YMCA has signed a lease extension. A new tenant, New Salem Baptist Church has signed a lease as well. THA staff also expect to temporarily license the vacant lot on site to a food truck company prior to sale of the parcel.

3.1.4. Predevelopment

Community outreach associated with the master plan has officially been completed. Ongoing communication with neighbors and businesses in the area is continuing as opportunities arise.

Tacoma Community College (TCC) has chosen to pursue the development of student housing on their campus rather than JCN. Their Foundation will lead this development effort in conjunction with a private development partner. Consequently, THA staff are exploring other development options and development partners for the first phase of JCN. THA staff expect the first phase will be listed for sale in May of 2021 in order to attract an interested and suitable development partner. Development partners will build new projects that are consistent with the design guidelines established under the master planning process.

Ankrom Moisan (AMA) has drafted façade and site improvement concepts for the buildings THA plans to hold for the next five to ten years. These improvements would activate the site and bring more modern touches to the exterior of the buildings. Staff believe this will help with leasing the remaining vacant spaces. THA has worked with AMA to estimate the cost of these improvements and now has a good understanding of what these improvements will cost and what order they should be implemented.

THA staff have begun the site plan approval process through the City of Tacoma. It is expected to be completed in August 2021.

Enterprise Community Partners staff have been updated with the financial impacts of the COVID pandemic and how it relates to the performance of James Center

North. Currently, JCN has adequate revenue to continue paying interest due on the acquisition loan. Staff is talking with finance about the possibility of THA funds being used to pay the first loan installment that is due in October, 2021. THA would receive the proceeds from the land sales to reimburse itself.

Staff is preparing to develop up to 150 units of affordable units that THA will own. Currently, we are planning on financing that would include a 9% LIHTC and a 4% LIHTC (also described as a 4%/9% combo). This combination of equity sources will allow the site to be developed all at once and offer a mix of deeply affordable units as well as rents that are affordable to households earning 60% of the AMI. This project plans to submit for 2023 LIHTC funding.

THA expects to list for sale approximately 1 acre of land known as phase 1a (NE corner of the property). The listing will request information from interested developers such as proposed unit count, unit mix, target population, and affordability requirements. Additional developer experience and price will be included among the information provided as well.

3.1.5. Operating Performance

Property cash flow is steady and work orders are minimal. Previously identified capital improvement repair items are being addressed regularly. Repair costs are consistent with feasibility estimates.

3.2. New Look (aka Alberta J. Canada) Capital Planning and Resyndication

Staff has begun the process of decoupling the parking lot from the AJC partnership. This action is to provide land for the Housing Hilltop project that has been planned. AJC has approximately 15 residents that require parking and they will be allocated spaces at the parking lot behind Key Bank or nearby location.

3.3. Arlington Drive Youth Campus

3.3.1. Crisis Residential Center

The Crisis Residential Center is complete. Community Youth Services (CYS) took over the building mid-June. Staff are finalizing all the payments and reconciling the budget.

3.3.2. Arlington Apartments

Options for using the construction cost savings are being evaluated to ensure that these will not create any issues with the limited partner at exit. Conversations with BFIM have begun and focused on funding a services endowment that would not require BFIM approval to access. We explored increasing the replacement reserve; however, BFIM was concerned that THA would not expend all of the replacement reserve by year 15, which would affect THA's exit costs. THA was originally scheduled to provide a loan of \$130,000; however, there is concern about the performance of Kaba locks and if these cannot be addressed through the warranty

process, additional funding will be needed. The THA loan may be used for this purpose and related options for funding are being identified. We will increase the developer fee by \$75,000.

3.4. Hillsdale Heights

Last year, THA leased to the City a portion of THA's property at 60th and McKinley for the City's establishment of a Tiny House Village for homeless persons. The lease stated the conditions required of the village, *e.g.*, required only tiny houses; amenities, no tents; security; services, community consultation. The City contracted with the Low Income Housing Institute (LIHI) to create and manage the village. The lease expires on December 30, 2021. The experience has been very positive. The City and LIHI have performed very well. Neighbors have been impressed as well.

THA has let the City know of THA's willingness to extend the lease. Such an extension would not interfere with THA's development plans for the site. But the City has stated its intention to vacate at the end of 2021.

3.4.1. Intergenerational Community

Staff is partnering with Bridge Meadows of Portland, OR to conduct a Feasibility Study to evaluate the development of two independent housing developments at the Hillsdale Heights property. The study focuses on THA developing on approximately half of the 7-acre parcel to produce 60-70 family orientated affordable housing units. The study will also focus on the sale of the remaining half of the parcel to Bridge Meadows for their proposed development of an Intergenerational Community serving families with foster children and seniors.

On April 5, 2021, staff published a joint RFQ/P, with Bridge Meadows, soliciting an architect/contractor team to assist with a Study. The study will produce a conceptual site plan for both developments with input from the city and community stakeholders, boundary line delineation to establish the limits of the parcel sale to Bridge Meadows, a Rough Order of Magnitude (ROM) construction cost estimate and budget for both developments. More details will follow later in the year.

On April 13, 2021, staff held a pre-bid conference with approximately (60) sixty participants. On April 27, 2021, staff received (5) five proposals and conducted (2) two interviews the week of May 3, 2021 and recommend awarding the Walsh/SMR team as the preferred provider for the feasibility study services. The Walsh/SMR fee is \$115,242.00 which will be split between THA and Bridge Meadows. THA's portion of the fee is \$57,621.00. The below table reflects the scoring of each proposal by the review committee.

Proposer	Capacity, Experience, Approach	Success	References	Fee	Total
Walsh/SMR	30.00	30.00	10.00	25.60	95.60
Ankrom/Marpac	28.20	25.20	9.20	23.40	86.00
GGLO/Bayley	25.20	23.80	8.80	14.40	72.20

Studio19/Synergy	17.80	15.40	8.80	25.00	67.00
Johnson/Charter	15.60	11.0	8.8	6.0	41.40

4. DEVELOPMENT PIPELINE PROJECTS

4.1. Hilltop Lofts and THA Owned Properties' Master Development Plan

There were two layers of community engagement for this project. In 2019, THA hosted four (4) homework groups and three (3) design labs. The homework groups reviewed the findings from the 2016 Housing Hilltop process and looked at macro level issues. Invitees included some neighborhood residents and those representing businesses, community organizations, and institutions in the Hilltop. The Design Labs were larger community events where specific design elements were addressed (i.e., the resident experience; exterior; community space). In addition, the community engagement specialists conducted outreach to traditionally under-represented communities to gather their input. Based on the feedback from these sessions, as well as input from staff and the THA internal design working group, a concept plan has been identified for the four buildings as well as activating the alley. The final plan calls for 237 units of housing in a mix of studio, 1-, 2- and 3-bedroom units. Each building has at least one floor of commercial uses; two of the buildings could have two floors of commercial use if sufficient interest is generated to support the commercial square footage. Three of the buildings are 6-stories and one is 4-stories tall. Approximately 84 on-site parking spots have been identified as well. The final draft of the Hilltop Community Framework plan was distributed to commissioners at the February meeting.

THA staff has discontinued negotiations with Inland Development about options to develop three parcels in the Hilltop. Timing was the primary reason this decision is made. Staff is working on a design-build strategy that would reduce development costs and still deliver high quality housing for Hilltop. We plan to request tax exempt bonds through the Public Housing Authority's bond pool in January 2022. An allocation of these bonds provides an automatic 4% LIHTC allocation. This timing is critical as an allocation of bonds from this pool is very competitive.

Funding for a permanent supportive housing project on the Mr Mac site has been secured. The last source to be awarded was the 9% tax credits. Funds had already been awarded by the City of Tacoma, Pierce County and Housing Trust Fund (HTF). The City, County and HTF application were a joint submission of THA and Horizon Housing Alliance. Horizon was the sole applicant for the tax credits and were the second highest scorer for the 2020 9% tax credit round.

Staff is negotiating with Horizon Housing Alliance on the ground lease. The guarantee issue has been resolved. Darin Davidson will be providing all the guarantees for the project (construction & tax credit). THA will no longer be a special member in the partnership nor required to provide the \$3MM in a standby loan that Wells Fargo would have drawn upon if there were any issues. The guarantee provided by Mr. Davidson has greatly streamlined

the documents and reduced risk for THA. THA will be providing a Housing Assistance Program (HAP) contract for all 57 units. Closing is anticipated to occur by the end of June.

In keeping with the commitments made during the #DesignTheHill community engagement process, Horizon issued a Call for Artists to help elicit community input on the exterior façade and public art piece. All interviewees were Hilltop residents. THA staff was on the interview panel and will be stay involved with this aspect of the design.

THA and Hilltop Housing Alliance (HHA) have been working with Tacoma Ministerial Alliance (TMA) to relocate Sam & Terry's and Mr. Mac. Their new location is 1310-1312 MLK. They relocated in mid-April.

4.1.1. City of Tacoma 311 and Community Mobilization

Staff continue to work with community partners on activities to support Hilltop businesses and organizations. This month we started planning for upcoming summer events, including the next Hilltop Crawl, and connected with additional community partners, including the Hilltop Business Association, to put on the upcoming activities. Events will also include community engagement activities and information distribution on health and other resources.

Staff also continue to work with our web consultant to build the new Activate Hilltop website. This site will be the central location to share important information on THA and other developments the Hilltop neighborhood, connect the community to services from the city and other community organizations and drive support to neighborhood businesses. The site will continue the “Hilltop is Beautiful” branding that has been used previously on community posters and construction banners.

4.2. Hilltop Eco District

Staff worked with the Eco District's staff through the latter half of 2020 to do a set of workshops for community leaders on forming an Eco District. We held those workshops in October (virtually) and for those sessions, nine people have volunteered to be on the Leadership Team for the Eco District. They have committed to meeting monthly for the first half of 2021 to set the foundation, establish governance and identify the priority issues for the organization. THA is working closely with Hilltop Action Coalition (HAC) on this effort. The Leadership Team currently has 14 participants. The purpose statement has been crafted and we are now identifying action items for the next 6-12 months..

4.3. Shiloh Baptist Church

RED staff have been meeting with Pastor Christopher since early 2019 to discuss the possibility of helping Shiloh redevelop their non-church land. They have 5 single family homes. Two of the homes have been subdivided to assist 12 individuals with housing. In September 2019, staff made a presentation to the church's senior leadership to discuss what was possible on the site, explain the development process and present the terms of a Memorandum of Understanding (MOU). Shiloh signed the MOU in October. THA will be

acting as a development consultant in this transaction. Shiloh was awarded predevelopment funding from Impact Capital and One Pierce. In total they plan to develop 60 units of new housing. We were able to secure \$2.1M in the capital budget through the legislature in 2021. We plan to submit applications to the City of Tacoma, Pierce County, Housing Trust Fund and Finance Commission in 2021.

4.4. Gault School Site

On January 7, 2020, THA entered into a Letter of Interest with Tacoma Public Schools for the acquisition of the Gault School site. In September, 2020, THA made the decision to discontinue its pursuit of the Gault Middle School because of the inability to secure funding for stage one work amid the current pandemic-impacted economy. Discussions are continuing with Tacoma Public Schools (TPS) and others about options for Gault. These include a role THA may play if the school is demolished.

4.5. Renew Tacoma Housing LLLP

The investor agreed to release a portion of the funds once the NFA letter was issued for K Street. Instead of waiting for NFA's for both sites before releasing the \$548,000 in escrow and \$3,452,000 in developer fee. We received K Street's NFA letter from the Department of Ecology (DOE) and the request for release of funds was approved and funded. Wright Street's Environmental Restrictive Covenant was filed of record and the No Further Action letter received on May 10th. A request for the release of the balance of the funds is being submitted to the investor and lender.

5. Tenant Improvement

5.1. 902 First Floor TI

Construction at the 902 1st floor Administration Building is underway. Demolition activities are 90% complete. Metal framing will follow demolition. Construction is estimated at 12 weeks. New furniture installation is planned in September. The 1st floor should be ready for occupancy in October upon approval from the Emergency Operations Committee.

6. Acquisitions

6.1. Two Letters of Intent were executed to acquire a property in south Tacoma and another in West Tacoma. The timeframe for entering into a purchase and sale agreement for the property in South Tacoma expired, so the owner is listing the property on the open market. We are waiting for the LOI to be signed by the owner of the property in West Tacoma. A new property has come to our attention that has some promise, as it is well located.

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7. Primary Projects

PRIMARY PROJECTS						
	Priority	Description	# Affordable Units	Innovation	Timeframe -Funding Notes	RED Staff
James Center North	1/1.5	Master Plan and redevelopment of retail strip. Anticipated 600 units, with at least 150 THA developed affordable rentals. Public/private partnership as land will be sold to development partners who agree to providing housing under the design guidelines.	150	Evaluating a Design Build approach to reduce costs for the affordable units. Under this approach, all architects, consultants and others are overseen by the general contractor. THA would have final approval on all design, materials, etc. At this time, this approach could reduce costs by 10-20%. Evaluating for a combination 4% to 9% LIHTC. This project will need PBV's or Faircloth. Sell parcels to private sector partners who agree to develop within parameters of design guidelines and request a set aside of at least 20% of units as affordable to HH's at 80% of the AMI or lower. Proceeds to retire REDI and LAP loans.	Apply for funds - 4%/9% combo apply in 2022 or 2023. GAP funding HOME/CDBG Completed by 2025 <i>Project will require PBV's or Faircloth.</i>	<u>Roberta</u> , Josh, Kim, David, Stacey

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Hilltop Housing	1	Proposal to develop 200-239 multifamily units with a mix of 1, 2, 3BR and commercial space (required by zoning). This is a 4% tax credit deal, so initially focused on households earning up to 60% of the AMI demand.	200	Inland would construct and oversee the initial lease up. THA and Inland would be members of the LLLP and THA would purchase Inland's interest within three years of placed in service. Inland will develop without mark up on construction. In lieu of the construction mark-up, they would receive a managing member buy out. Funds for the buy-out would come from the Developer Fee and THA. FPI as third-party manager.	Apply for bonds by January 2022 and expect to close by March 2022. Complete by early 2024.	Roberta, Alyssa, Lisa FPI for Property Management *David/Cindy - to participate in design meetings. Cindy to coordinate with
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Shiloh Baptist Church	1	THA -development consultant for Shiloh.	60	Several local churches have land in which they are interested in developing as affordable housing. This partnership will demonstrate how this may be achieved. Shiloh currently offers housing for a similar population. 60 units are planned.	Shiloh to receive \$2.1M in state set aside funds. 2022 9% LIHTC Application complete 2024. <i>Project would benefit from PBV's.</i>	<u>Roberta, Alyssa, Lisa, David Kim</u>
P1500 Block	2	This will be a redevelopment site. Planning 53 one and two-bedroom units. Initial plan calls for senior housing as new housing for seniors has not been added and is in demand	50	Site may be appropriate for a super-efficient, manufactured design product.	Planning started. 2022/2023 finalize construction/financing approach. Good site for new funding options (i.e. HOME possible 202 and State \$\$). <i>Faircloth or PBV's needed.</i>	<u>Vickie, Kim, Construction PM, Stacey</u>
2300 Block	2	The 2300 Block is due for an interior and exterior refresh. Resyndication is unlikely given the competition for bond cap. Anticipate federal funding through the infrastructure/stimulus package that could be used for upgrades.		Ideally undertake the renovation concurrently with the redevelopment of the 1500 Block.	Finalize the capital plan and solicit for a GC and obtain baseline cost estimates 2021. Begin rehab, including relocation activities 2022-23. HOME and/or CDBG Funds.	<u>Vickie, Karen P. Stacey, Cindy, Construction Manager. Will need relocation support.</u>

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Forterra/Rite Aid	3	Forterra acquired the Rite Aid site and is planning 400 units. Of these, 100 +/- will be affordable rentals. The balance will be developed as market rate apartments and affordable equity coops at 80% of the AMI. Forterra has asked THA to develop the rental housing. As currently planned, this would be a turn-key project.	100	This will be developed using cross laminate timber, which should be structurally sound and exceed environmental sustainability goals. Forterra would like to develop and sell to THA. Feasibility is ongoing.	9% LIHTC. Timeframe TBD	Roberta, Alyssa, Lisa, Kim
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<u>Hillsdale Heights/Bridge Meadows</u>	3	This is a 6+acre parcel. LIHI is currently using a portion of the site for tiny homes. We are in discussions with Bridge Meadows about developing intergenerational housing at this site. Bridge Meadows would purchase the land for their development and THA would hold land for future multifamily units.	75	In 2021, work with Bridge Meadows to develop a proposed site plan that will identify ways to jointly develop infrastructure, construction timing, potential to share parking and community amenities.	Apply for 9% LIHTC funds for THA portion in 2024. Could accelerate with additional funds through stimulus. Project completion 2026. PBV's or Faircloth will be needed.	<u>Steve</u> , Kim, Stacey, Construction PM
<u>Salishan Core</u>	5	Mixed use building. Possible location of additional THA offices and community spaces, with one-bedroom units making up the upper floors.	50	Envision a mixed use development that would include additional THA offices, possible community spaces, commercial kitchen. One-bedroom units needed at Salishan to for households whose household size has decreased.	2026 9% LIHTC for housing. This project could accelerate depending on funding opportunities and priorities with funding.	<u>Steve</u> , Vickie, Alyssa, Kim, Lisa

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<u>Acquisitions</u>	Recurring Priority 1	Acquire class B/C properties that offer reasonable rents and have sufficient income to take on new debt and cover operating expenses. Often, without property taxes these become financially viable for THA. The goal to acquire one property annually will be accelerated due to housing need and funding available to address this need. These will be class B/C properties that will retain affordability over time by not increasing rents at the same rate as found in the private market. These properties generate revenue for the agency.	500	The Greater Tacoma Community Foundation has investors interested in providing equity to acquire properties. Sources of equity have been the greatest challenge to acquiring properties. Another \$5M from State Set-aside. Additional funding anticipated from the feds through to the state and local governments. Will likely require third party management. Rapid Acquisition Team and process will be in place.	This project could accelerate depending on funding opportunities and priorities with funding.	Cindy, Josh, David, Vickie, Kim Stacey
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Redevelopment/Future Development Prospects	1 (acq)	Retail strips are being redeveloped across the country. One advantage is the revenue these retail areas generate while redevelopment plans are crafted and put into play. Opportunity to engage in public/private partnership for the redevelopment and have a long lead time for planning. Redevelopment planning in five years, with execution in 7-10. This is a locally owned retail area, which has advantages for how the property could be acquired.			Planning Redevelopment:	
	1	Broken Spoke - retain affordability of ten units on MLK, retain affordable commercial.	10	Retain affordability of 10 rental units. Use as Pilot to grow BIPOC capacity to own, manage and access capital. Could be done through a master lease with intention to transfer ownership at a future date. Control alley adjacent to Housing Hilltop Project	2021	Roberta Alyssa, Cindy, Kim

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	4	Michael's Plaza	200+	We have been approached about the possibility of acquiring a large retail area near the Tacoma Mall with a retail area of 15 acres +/- that could be acquired and developed over time. Current retail would need to be sufficient to cover new loan needed to purchase the property. RED is evaluating the potential of this project as a future redevelopment site, options to create public/private partnerships for the redevelopment and have a long lead time for planning, identifying sources of financing and equity and timeframe.	2021 Acquisition -2026 Redevelopment	<u>Cindy</u> , Karen P. Kim, Josh Stacey
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TACOMA HOUSING AUTHORITY

NEW BUSINESS

Resolution 1



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (1)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Continued Moratorium on Time Limit End of Participation Program Exits

This resolution would authorize a revised COVID-19 Executive Action 12.2 allowing for a continued moratorium on time limit-driven program exits and suspension of non-housing related program conditions through September 30, 2023.

Background and Summary of Recommendations

THA has four tenant-based rental assistance programs that have time limits:

- Housing Opportunity Program (HOP)
- College Housing Assistance Program (CHAP)
- Child Housing Opportunity Program (CHOP)
- Family Unification Program for Youth (FUP-Y)

Three of these programs have fixed subsidy rent calculations (HOP, CHAP, CHOP) and two have non-housing related program requirements (CHAP and CHOP). In June 2020, THA noted that COVID-19 and the resulting economic crisis was harming participants in these programs. In response, THA suspended time limits through December 31, 2020, and in October 2020, extended this moratorium through December 31, 2021.

The pandemic and the economic hardship continue to afflict participants in these programs. This resolution would extend the moratorium on time limits and suspend all non-housing related program conditions until September 30, 2023. That date is also the date the federal government chose as the expiration of its emergency housing vouchers issued to address the pandemic hardships.

This resolution would have the Board approve this extension by revising the October 2020 Executive Action 12.1. Below is a summary of what this resolution will do:

- THA will continue paying housing assistance payments (HAP) for households beyond their normal time limit through September 30, 2023. This applies to the Housing Opportunity Program (HOP), Child Housing Opportunity Program (CHOP) and tenant-based College Housing Assistance Program (CHAP). This applies to the Family Unification Program Youth (FUPY) as permissible by Housing and Urban Development (HUD) waivers.

- THA will suspend all non-housing related program conditions through September 30, 2023. At that time, THA will reconsider the applicability and usefulness of these conditions. This applies to the Child Housing Opportunity Program (CHOP) and tenant-based College Housing Assistance Program (CHAP).

The addendum to Executive Action 12 is attached to this resolution.

NOTE: This resolution will effectively suspend the CHAP program for two years. While staff propose this to protect present program participants, the suspension also means that other TCC and UW-Tacoma students waiting their turn will not get their turn. That population of students is just as needy. That population are just as disproportionately students of color as current participants.

While this resolution is based on the economic and housing needs that have resulted from the COVID-19 pandemic, staff have been analyzing the efficacy of time-limits and fixed subsidies on our Housing Opportunity Program (HOP), Child Housing Opportunity Program (CHOP), and College Housing Assistance Program (CHAP). The Board will see this report at a future Board meeting, which may result in recommendations for longer term changes to these programs.

Recommendation

Authorize THA's Executive Director to revise and implement the COVID-19 Executive Action 12.2 allowing for a continued moratorium on time limit-driven program exits and suspend non-housing related program requirements through September 30, 2023.



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (1)

(Continued Moratorium on Time Limit End of Participation Program Exits, Transition to Income-Based Rent Calculation, and Suspension of Non-Housing Related Program Requirements)

WHEREAS, THA has four time-limited rental assistance programs: Housing Opportunity Program (HOP), Child Housing Opportunity Program (CHOP), tenant-based College Housing Assistance Program (CHAP) and Family Unification Program Youth (FUPY); and

WHEREAS, Two of which have non-housing related program requirements: Child Housing Opportunity Program (CHOP) and tenant-based College Housing Assistance Program (CHAP); and

WHEREAS, Each time-limited program has participants scheduled to reach the end of their program participation before September 30, 2023; and

WHEREAS, Program participants have been significantly impacted by the COVID-19 pandemic and need longer term rental assistance with no non-housing related requirements through September 30, 2023; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City Of Tacoma, Washington, that:

THA's Executive Director is authorized to revise and implement the COVID-19 Executive Action 12.2 allowing for a continued moratorium on time limit-driven program exits and suspension of non-housing related program conditions.

Approved: June 23, 2021

Stanley Rumbaugh, Chair



TO: Emergency Operations Committee

FROM: Michael Mirra, Executive Director

DATE: June 23, 2021

RE: Addendum to Executive Action 12

Rental Assistance Clients: Continued Moratorium on Time Limit End of Participation Program Exits and Suspension of Non-Housing Related Program Requirements

- Executive Action 12 created a moratorium on time limit exits from THA's voucher programs. That extension was set to expire December 31, 2020. An addendum to Executive Action 12 provided that THA will continue paying housing assistance payments (HAP) for households beyond their normal time limit through December 31, 2021. This addendum extends this moratorium through September 30, 2023.
 - This applies to the Housing Opportunity Program (HOP), Child Housing Opportunity Program (CHOP) and tenant-based College Housing Assistance Program (CHAP). This applies to the Family Unification Program Youth (FUPY) as permissible by HUD waivers.
 - THA's final HAP payment for these extended households will be September 1, 2023 for the September 2023 HAP payment.
 - This policy change is effective immediately and until further notice.
- THA will suspend all non-housing related program conditions through September 30, 2023.
 - This applies to the Child Housing Opportunity Program (CHOP) and tenant-based College Housing Assistance Program (CHAP).
 - This policy change is effective immediately and until further notice.

Resolution 2



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (2)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Power of Eminent Domain for Acquisition of Affordable Housing

This resolution would authorize Tacoma Housing Authority (THA) to use its power of eminent domain (aka condemnation) to acquire existing multifamily properties. The Board of Commissioners would retain final approval of all condemnations or negotiated purchases in lieu thereof.

Background

As indicated in THA Resolution 2021-05-26(1), THA is pursuing the acquisition of multifamily properties that may currently offer rents that are affordable to households earning 60% to 120% of Area Median Income. The competition for acquiring such properties is quite strong, and such properties are vital to THA's mission to provide affordable housing. One possible strategy for acquisition of these properties is condemnation (aka the exercise of the power of eminent domain) or negotiated purchase in lieu of condemnation.

Under RCW 35.82.110, THA has "the right to acquire by the exercise of the power of eminent domain any real property which [THA] may deem necessary for its purposes under [Chapter 35.82 RCW] after the adoption by it of a resolution declaring that the acquisition of the real property described therein is necessary for such purposes." However, even when the power of eminent domain is invoked, RCW 8.26.180(1) directs government agencies with the power of eminent domain to make every reasonable effort to acquire real property by negotiation.

This power of eminent domain gives THA a competitive advantage over buyers who do not have such power. Specifically, RCW 82.45.010(3)(h) and WAC 458-61A-206 provide that transfers made pursuant to condemnation proceedings or by purchase under an imminent threat of condemnation are exempt from real estate excise tax. The graduated real estate excise tax rate charged by the State of Washington on sales of real property such as multifamily property currently ranges from 1.1% to 3%. The local real estate excise tax rate charged in Tacoma is currently 0.5%. This means that, depending on the sale price of a property, a condemnation or purchase in lieu thereof can result in savings to a seller of between 1.6% and nearly 3.5% of the price as compared with a sale not made under threat

of condemnation. Thus, it may be possible for THA to offer a price that is the same or slightly lower than that offered by other buyers but that will result in higher net proceeds to the seller.

Similarly, while THA would not provide income tax advice to real estate sellers, it may be possible for those sellers to defer gain on the proceeds of a condemnation or purchase in lieu thereof pursuant to Internal Revenue (“IRC”) Section 1033. More particularly, IRC Section 1033 has distinct advantages over more common “like-kind exchanges” performed pursuant to IRC Section 1031. IRC Section 1033 provides for a much longer period for identification and purchase of replacement property than IRC Section 1031. In addition, a like-kind exchange under IRC Section 1031 requires the use (and expense) of a qualified exchange facilitator who generally must receive and hold sale proceeds on behalf of the seller pending acquisition of replacement property; IRC Section 1033 does not require the involvement of an exchange facilitator.

Recommendation

Approve Resolution 2021-06-23 (2) authorizing THA to acquire multifamily properties by condemnation or by negotiated purchase in lieu thereof. All acquisitions by condemnation or purchase in lieu thereof will be subject to further board resolutions of necessity and final board approval.



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (2) (Power of Eminent Domain for Acquisition of Affordable Housing)

A RESOLUTION of the Board of Commissioners of the Housing Authority of the City of Tacoma

Whereas, There is a critical shortage of modestly priced rental housing in the City of Tacoma; and

Whereas, Time is of the essence as THA has secured funding for equity and is willing and able to use THA resources to supplement those funds; and

Whereas, Sellers are made aware of the advantages of selling to a Public Housing Authority pursuant to condemnation (aka the exercise of the power of eminent domain) or purchase in lieu thereof. These include favorable real estate excise tax treatment and the possibility of deferring gain pursuant to Internal Revenue Code Section 1033; and

Whereas, All acquisitions by condemnation or purchase in lieu thereof will be subject to further board resolutions of necessity and final board approval; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

Subject to further board resolutions of necessity and final board approval, THA is authorized to acquire multifamily housing by condemnation or by negotiated purchase in lieu thereof.

Approved: June 23, 2021

Stanley Rumbaugh, Chair

Resolution 3



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (3)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Acquisition of the North Highland Court Apartments by Condemnation or Negotiated Purchase in Lieu Thereof

This resolution would authorize Tacoma Housing Authority (THA) to acquire the North Highland Court Apartments (the “Property”) by condemnation or by negotiated purchase in lieu thereof, subject to final board approval.

Background

The Property is a 35-unit apartment complex located at 3015 N Highland Street in Tacoma. The property currently offers rents that are affordable to households earning 60% to 120% of Area Median Income. It is located near Pearl Street, providing mass transit opportunities to residents. Based on the foregoing, and subject to satisfactory due diligence work still to be performed by THA, acquisition of the Property by THA would preserve vital affordable housing in Tacoma.

Recommendation

Approve Resolution 2021-06-23 (3) authorizing THA to declare the acquisition of the Property as necessary to fulfill THA’s public purpose of providing affordable housing and to direct the Executive Director of THA to acquire the Property by condemnation or by negotiated purchase in lieu thereof for an approximate sale price of \$5,000,000.00. Notwithstanding the foregoing, approval by the Board and by the Executive Director will be required before an offer of just compensation is made pursuant to condemnation or before, in connection with a negotiated purchase in lieu of condemnation, any earnest money becomes nonrefundable to THA.



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (3)

(Acquisition of the North Highland Court Apartments by Condemnation or Negotiated Purchase in Lieu Thereof)

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

Whereas, there is a critical shortage of modestly priced rental housing in the City of Tacoma; and

Whereas, the Housing Authority of the City of Tacoma (“THA” or “the Housing Authority”) is charged with addressing pursuant to its mission of providing quality affordable housing opportunities equitably distributed within the City of Tacoma; and

Whereas, it is a goal of local government and the Housing Authority to further fair housing in the region affirmatively, in part through preservation of existing affordable housing opportunities in areas with significantly appreciating housing costs; and

Whereas, North Highland Court Apartments (the “Property”) is a 35-unit apartment complex located at 3015 N Highland Street, Tacoma, Washington, in an area of Tacoma where rents are increasingly unaffordable to low-income households; and

Whereas, RCW 35.82.070(2) provides, in part, that a housing authority shall have the power to acquire housing projects within its area of operations, and RCW 35.82.070(5) authorizes a housing authority to acquire real property by exercise of the power of eminent domain or by purchase in lieu of exercise of the power of eminent domain; and

Whereas, acquisition of the Property by the Housing Authority will serve the mission of the Housing Authority and the housing goals of the region through an approach that is considerably less expensive than constructing the same number of new housing units; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

Section 1: Acquisition of the Property by the Housing Authority is necessary to preserve and provide housing for persons of low income that is equitably distributed in various areas of its operations.

Section 2: The Board of Commissioners hereby authorizes the Executive Director (i) to give notice to the current owner of the Property of the Housing Authority’s intention to acquire the Property by eminent domain if it is unsuccessful in acquiring the Property on satisfactory terms

through negotiation and purchase in lieu of condemnation; and (ii) subject to the terms below, to acquire the Property by condemnation through exercise of the Housing Authority's power of eminent domain, if it is unsuccessful in acquiring the Property on satisfactory terms through negotiation with and purchase from the owner in lieu of condemnation.

Section 3: The Executive Director is hereby vested with the authority, and with discretion in the exercise of such authority, to negotiate the terms of an agreement to purchase for the Property at a price of approximately Five Million Dollars (\$5,000,000) and to pay into the purchase escrow the earnest money deposit for the purchase of the Property.

Section 4: If the Executive Director is successful in negotiating the terms of an agreement for the purchase of the Property, then the Executive Director is authorized and directed to execute the same. Following reviewing the results of inspection of the Property and other due diligence, and prior to any earnest money becoming nonrefundable to the Housing Authority, the Executive Director shall make a recommendation to the Board of Commissioners as to whether to proceed with closing the purchase of the Property. If the Executive Director recommend proceeding and the Board of Commissioners approves of the same, then the Executive Director shall be authorized to take any and all actions necessary to close on the purchase of the Property on the terms approved by the Board of Commissioners.

Approved: June 23, 2021

Stanley Rumbaugh, Chair

Resolution 4



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23(4)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Authorize Investment Institutions and Authorized Signers

This resolution would update the institutions we conduct financial transactions with, along with the signers for the Tacoma Housing Authority.

Background

Tacoma Housing Authority's (THA) present Executive Director intends to retire on July 5th, 2021, and the Director of Finance has moved to an advisory position. These changes necessitate a resolution that authorizes their successor's signatures for the financial institution accounts of the Tacoma Housing Authority.

The resolution replaces Resolution 2020-09-08 (3), which had authorized the staff members as signers for the bank and investment accounts of the Tacoma Housing Authority and identifies the new ones, as well as the authorized THA staff members.

Recommendation

Approve Resolution 2021-06-23 (4) replacing 2020-09-08 (3) authorizing the signers for the financial institutions.

RESOLUTION 2021-06-23 (4)



TACOMA HOUSING AUTHORITY

(Authorized Signers for Financial Institution Accounts)

WHEREAS, The Director of Finance and the Executive Director will no longer be in their respective roles as of July 5th, 2021. With these staffing changes, THA needs a resolution changing the authorized signatures for its accounts at its various financial institutions; and

WHEREAS, This resolution does that and replaces Resolution 2020-09-08 (3), which had authorized previous officers as signers; and

WHEREAS, The Board of Commissioners needs to formally authorize the financial institutions and the authorized signers on the accounts; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington that:

The funds of THA are hereby authorized by the laws of the State of Washington and the regulations of the Department of Housing and Urban Development to be utilized, held and invested and that said funds may be deposited with any or all of the following institutions:

BANK OF AMERICA
BANNER BANK
HERITAGE BANK
KEY BANK
J.P. MORGAN CHASE BANK
U.S. BANK
THE BANK OF NEW YORK MELLON TRUST CO.
WASHINGTON STATE INVESTMENT POOL

Or such other institutions as may be found to provide the highest interest rate and/or are beneficial to THA's operational goals.

Be it further resolved that any of the below designated individuals are authorized to enter into any and all transactions relating to the above-mentioned institutions as they exist now or may be created in the future upon signature of any two (2) of the following designated individuals:

Stanley Rumbaugh	Chair _____
Shennetta Smith	Vice Chair _____
April Black	Executive Director _____
Richard Deitz	Director of Finance _____
Duane Strom	Comptroller _____

Be it further resolved that this resolution replaces any and all previous resolutions designating authorized financial institutions.

Be it further resolved that the authorized signers acknowledge and accept Heritage Bank's policy of accepting any check with one authorized signature.

Be it further resolved that this resolution will come into effect on July 5, 2021.

Approved: June 23, 2021

Stanley Rumbaugh, Chair

Resolution 5



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (5)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Extending the Collective Bargaining Agreement with OPEIU

This Resolution would authorize the Executive Director to sign the Memorandum of Understanding (MOU) to extend the Collective Bargaining Agreement (CBA) between the Tacoma Housing Authority (“THA”) and the Office and Professional Employee International Union local 8 (“OPEIU”).

Background

In June of 2018 the Collective Bargaining Agreement (CBA) was negotiated by representatives of OPEIU and THA effective July 1, 2018. That CBA is set to expire on June 30, 2021. The negotiating teams from OPEIU and THA have not begun negotiations for the next CA due to impediments caused by the COVID pandemic and staff turnover in the Human Resources department. THA and OPEIU propose to extend the present CBA for one year on the terms below.

Attached is a Memorandum of Understanding (MOU) showing the details of the extension. This has already been ratified by union members and signed by the OPEIU Business Manager. This Agreement will allow the continuance of salary increases which has been allowed for the past three years. In summary, it allows:

- A 3% across-the-board increase process in July 2021.
- A 2% budget for the Variable Pay budget for 2021/2022.

Extending the CBA for one year will allow the negotiating teams to have time to bargain collaboratively without having the pressure of an expired Agreement.

Recommendation

Approve Resolution 2021-06-23 (5) authorizing THA’s Executive Director to sign the MOU to extend the CBA between OPEIU and THA.



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (5) (Approval of Extending Collective Bargaining Agreement with OPEIU)

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

Whereas, The collective bargaining agreement (CBA) between the Housing Authority of the City of Tacoma (THA) and the Office and Professional Employees International Union, Local 8 (OPEIU) will expire on June 30, 2021; and

Whereas, OPEIU gave timely notice to THA to reopen negotiations for a new CBA; and

Whereas, THA and OPEIU have not have the opportunity to begin negotiations; and

Whereas, THA and OPEIU have reached an agreement to extend the existing CBA for one year; and

Whereas, OPEIU has signed the attached MOU; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

1. Extend the current Collective Bargaining Agreement with the Office and Professional Employees International Union, Local 8 through June 30, 2022.
2. Allow the continuance of salary increases for all-staff which has been allowed for the past three years. In summary, allow:
 - A 3% across-the-board increase process in July 2021.
 - A 2% budget for the Variable Pay budget for 2021/2022.
3. Effective Date. This resolution shall be in full force and effect from and after its adoption and approval.

Approved: June 23, 2021

Stanley Rumbaugh, Chair

MEMORANDUM of UNDERSTANDING
Between
Office and Professional Employees International Union, Local 8
And
Housing Authority of the City of Tacoma

Extension of Collective Bargaining Agreement

The purpose of this Memorandum of Understanding between Office and Professional Employees International Union, Local 8 (OPEIU or Union) and Housing Authority of the City of Tacoma (THA or Employer) is to memorialize an agreement to extend the terms of the expiring collective bargaining agreement (CBA) which cover the period of July 1, 2018 through June 30, 2021 (the “Agreement”).

Specifically, OPEIU and THA agree as follows:

1. The terms of the Agreement will be extended by one year, with a new expiration date of June 30, 2022 (the “Extension”).
2. Effective July 1, 2021, all then current, regular bargaining unit employees will be eligible for an across-the-board salary increase as listed below. The parties agree on the following terms.
 - (a) All regular employees not covered by (c), (d) and (e) will receive a 3.0% pay increase.
 - (b) An employee whose salary, with the addition of the pay increase, would reach or exceed the top of their position’s Pay Grade will receive an increase to their salary that is the lesser of (i) to the top of the new range; or (ii) their eligible percentage. They will receive the difference between their eligible percentage increase and their actual percentage increase in a lump sum.
 - (c) An employee who was hired or promoted between April 1, 2021 and May 31, 2021 will receive a general wage increase of 1.5%.
 - (d) Employees hired or promoted on or after June 1, 2021 will not be eligible for a salary increase in 2021.
 - (e) THA temporary employees are not eligible for this increase.
3. In addition to the above salary increase, Employer will create a twelve (12) month Variable Pay Plan pool from July 1, 2021 through June 30, 2022. Bargaining unit employees who are employed in a regular classification are eligible for Variable Pay according to the terms of the THA Policy HR-20.35 Variable Pay Revised June 15, 2016. Employer reserves the right to distribute this pool in the forms determined by the revised THA Policy HR-20.35 Variable Pay, Revised June 15, 2016.

The funding for this Variable Pay pool will equal 2% of the OPEIU salary budgeted from July 1, 2021 through June 30, 2022. This budget will be established and approved by the Board of Commissioners and will remain the same whether positions are filled or unfilled. Employer reserves the right to decrease the size of this target pool should Employer incur a significant revenue shortfall as a result of state or federal budget restrictions.

The provisions of this MOU shall be effective June 23, 2021.

This MOU supersedes any inconsistent language in the parties' CBA and any prior MOU regarding the subject matter of this MOU.

**OFFICE AND PROFESSIONAL
EMPLOYEES INTERNATIONAL
UNION LOCAL 8**

By: 

Print Name: Valarie Peaphon

Print Title: Union Representative

Date: 6/9/2021

**HOUSING AUTHORITY FOR THE
CITY OF TACOMA**

By: _____

Print Name: _____

Print Title: _____

Date: _____

Resolution 6



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (6)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Replacement Omnibus Resolution for Hilltop Lofts

This resolution will authorize THA to lease property to Hilltop Lofts Housing, LLC (the “Company”), to withdraw as a member of the Company, and to execute documents related to the closing with the investor member and various funders in connection with the development of Hilltop Lofts. This resolution repeals and replaces Resolution No. 2021-04-28(4).

Background

THA has partnered with Horizon Housing Alliance (the “Sponsor”) in connection with the development of the Hilltop Lofts Apartments to be located at 1120-1124 Martin Luther King Way, in Tacoma, Washington. This is a 57-unit permanent supportive housing project for individuals exiting homelessness. The community prioritized permanent supportive housing in THA’s 2019 #DesigntheHill community engagement process.

The Hilltop Lofts Apartments will be owned and operated by the Company and located on land leased to the Company by THA. Wells Fargo Affordable Housing Community Development Corporation (the “Investor”) will be admitted as the investor member of the Company and, in connection with the Investor’s admission, THA will withdraw as a member of the Company. In exchange for an expected allocation of federal low-income housing tax credits and other federal tax benefits, the Investor is expected to make capital contributions to the Company, which will be used by the Company to establish reserves, pay construction costs, and retire a portion of the Company’s debt. Construction financing for the Hilltop Lofts Apartments will be provided by Wells Fargo Bank, National Association. Other anticipated funding sources include loans from the Washington State Department of Commerce, Pierce County, and the Tacoma Community Development Authority. THA and the Sponsor will share a right of first refusal to acquire the Hilltop Lofts Apartments following the end of the 15-year tax credit compliance period.

Recommendation

Approve Resolution No. 2021-06-23 (6).



TACOMA HOUSING AUTHORITY

HOUSING AUTHORITY OF THE CITY OF TACOMA

RESOLUTION NO. 2021-06-23 (6)

A RESOLUTION OF THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF TACOMA, authorizing the Authority to withdraw as investor member of Hilltop Lofts Housing, LLC; authorizing the lease of Authority property to Hilltop Lofts Housing, LLC; approving the execution and delivery of documents relating to Hilltop Lofts Housing, LLC, the ground lease, and otherwise in connection with the development of the Hilltop Lofts housing project; repealing Resolution No. 2021-04-28(4); and determining related matters.

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF TACOMA as follows:

Section 1. Recitals and Findings. The Board of Commissioners (the “Board”) of the Housing Authority of the City of Tacoma (the “Authority”) finds and determines that:

(a) Statutory Authorization. The Authority is authorized by the Housing Authorities Law (chapter 35.82 RCW) to, among other things: (i) “make and execute contracts and other instruments, including but not limited to partnership agreements” (RCW 35.82.070(1)); (ii) “delegate to one or more of its agents or employees such powers or duties as [the Authority] may deem proper” (RCW 35.82.040); and (iii) “prepare, carry out, acquire, lease and operate housing projects; to provide for the construction, reconstruction, improvement, alteration or repair of any housing project or any part thereof” (RCW 35.82.070(2)). The phrase “housing project” is defined by RCW 35.82.020 to include, among other things, “any work or undertaking . . . to provide decent, safe and sanitary urban or rural dwellings, apartments, mobile home parks or other living accommodations for persons of low income.” The Uniform Electronic Transactions Act (chapter 1.80 RCW) provides that each governmental agency of the State of Washington “shall determine whether, and the extent to which, a governmental agency will send and accept electronic records and electronic signatures to and from other persons and otherwise create, generate, communicate, store, process, use and rely upon electronic records and electronic signatures” (RCW 1.80.170(1)).

(b) The Company. Horizon Housing Alliance, a California nonprofit public benefit corporation (the “Sponsor”) formed Hilltop Lofts Housing, LLC (the “Company”) by filing a Certificate of Formation with the Secretary of State of the State of Washington on January 13, 2020. Pursuant to an Operating Agreement for Hilltop Lofts Housing, LLC dated as of January 21, 2020 (the “Original Operating Agreement”), Hilltop Lofts Manager, LLC (the “Manager”), a Washington limited liability company of which the Sponsor is the sole member and manager, is the managing member of the Company, and the Authority is the initial investor member of the Company. Wells Fargo Affordable Housing Community Development Corporation (or one or more of its affiliates) (collectively, the “Investor”) is willing to be a special investor member in the Company and to make capital contributions to the Company if the Authority relinquishes its investor member interest. In connection with the admission of the Investor as a special investor member, it is necessary to amend

and restate the Original Operating Agreement, and to execute and deliver certain other agreements, certificates and documents relating to the Company and the Project (as defined below).

(c) The Project. The Sponsor formed the Company to finance the acquisition, construction, and equipping of an approximately 57-unit residential rental project located in the vicinity of 1120 to 1124 Martin Luther King Way, in Tacoma, Washington (the “Project”). The Authority owns the fee simple interest in the land on which the Project is to be located. To facilitate the Borrower’s development of the Project, the Authority will lease its interest in the land on which the Project is to be located to the Borrower, and will encumber the Authority’s fee interest with certain regulatory covenants and use restrictions. The land lease and real property encumbrances are necessary to support the poor and infirm, are important for the feasibility of the Project, and are necessary to enable the Authority to carry out its powers and purposes under the Housing Authorities Law.

Section 2. Approval of Transaction Documents. The Authority’s Executive Director, the Chair of the Board, and their respective designees (each, an “Authorized Officer” and, collectively, the “Authorized Officers”), and each of them acting alone, are authorized and directed to execute, deliver and, if applicable, file (or cause to be executed and delivered and, if applicable, filed) on behalf of the Authority (i) those documents listed in Exhibit A (collectively, the “Transaction Documents”) in such forms as any Authorized Officer may approve (with the understanding that an Authorized Officer’s signature on a Transaction Document shall be construed as the Authority’s approval of such Transaction Document); and (ii) any other documents reasonably required to be executed by the Authority to carry out the transactions contemplated by the Transaction Documents. The Authorized Officers (and each of them acting alone) are further authorized and directed to take any other action and to execute such other documents as may be required to be taken or executed by the Authority under the provisions of or as necessary to carry out the transactions contemplated by the Transaction Documents (including the amendment of any such documents if necessary to further the purposes thereof or resolve ambiguities therein).

Section 3. Approval of Ground Lease and Real Estate Encumbrances. In furtherance of its statutory authority to provide decent, safe and sanitary living accommodations for persons of low income, the Authority is authorized to (i) lease to the Borrower, for a term not exceeding 76 years, the land on which the Project is to be located; (ii) encumber the Authority’s interest in the Project and the land on which it is to be located (including its fee interest therein) pursuant to certain covenant agreements, regulatory agreements, extended use agreements, and other similar encumbrances; and (iii) encumber the Authority’s interest in property adjacent to the land on which the Project is to be located with certain easements necessary or desirable for the construction and operation of the Project (the documents referred to in subsections (i), (ii), and (iii) are collectively referred to as the “Real Estate Documents”); provided, however, the foregoing authorization does not include any encumbrance that provides the grantee or beneficiary the right or potential right to foreclose on (whether by judicial foreclosure, non-judicial foreclosure, deed in lieu, or otherwise), terminate, or otherwise vacate by any means all or any portion of the Authority’s interest in such land, improvements, or property.

Section 4. Authority Regarding Membership Interests. The Authority is authorized to relinquish its investor member interests in the Company.

Section 4. Supplemental Authorization. The Authorized Officers, and each of them acting alone, are authorized on behalf of the Authority to: (i) determine that any document authorized by this resolution is, at the time such document otherwise would be executed, no longer necessary or desirable and, based on such determination, cause the Authority not to execute or deliver such document; (ii) execute and deliver and, if applicable, file (or cause to be delivered and/or filed) any government forms, applications, affidavits, certificates, letters, documents, agreements and instruments that such officer determines to be necessary or advisable to give effect to this resolution and to consummate the transactions contemplated herein; and (iii) notwithstanding any other Authority resolution, rule, policy, or procedure, to create, accept, execute, send, use, and rely upon such tangible medium, manual, facsimile, or electronic documents, records and signatures under any security procedure or platform, as in such Authorized Officer's judgment may be necessary or desirable to give effect to this resolution and to consummate the transactions contemplated herein.

Section 5 Execution of Duties and Obligations. The Board authorizes and directs the Authority's Executive Director to cause the Authority to fulfill the Authority's duties and obligations under the Transactions Documents.

Section 6. Acting Officers Authorized. Any action authorized or required by this resolution to be taken by the Authority's Executive Director may, in such person's absence, be taken by the acting Executive Director of the Authority.

Section 7. Changes to Titles or Parties. While the titles of and parties to the Transaction Documents may change, no change to such titles or parties shall affect the authority conferred by this resolution to execute, deliver, file (if required), enforce and perform the documents in their final form.

Section 8. Ratification and Confirmation. All actions of the Authority and its officers prior to the date hereof and consistent with the terms of this resolution (including, without limitation, the Authority's actions in connection with the formation of the Company and the execution of the Original Operating Agreement) are ratified and confirmed.

Section 9. Repeal of Resolution No. 2021-04-28(4). Resolution No. 2021-04-28(4) of the Authority, adopted April 28, 2021, is hereby repealed.

Section 9. Effective Date. This resolution shall be in full force and effect from and after its adoption and approval.

ADOPTED by the Board of Commissioners of the Housing Authority of the City of Tacoma at an open public meeting held on June 23, 2021.

HOUSING AUTHORITY OF THE CITY
OF TACOMA

Chair, Board of Commissioners

ATTEST:

Executive Director

Exhibit A **Transaction Documents**

Company Documents

- Amended and Restated Operating Agreement by and among the Authority, as withdrawing investor member, the Managing Member, and the Investor; and
- Right of First Refusal, Purchase Option Agreement among the Sponsor, the Authority, the Company, the Managing Member, and the Investor.

Commerce Document

- Low Income Housing Covenant Agreement made by the Company and the Authority for the benefit of the Department of Commerce, a department of the State of Washington.

HUD Documents

- Agreement to Enter into Housing Assistance Payment Contract between the Authority and the Company;
- Housing Assistance Payment Contract between the Authority and the Company; and
- Rider to Agreement to Enter into Housing Assistance Payments Contract and Housing Assistance Payment Contract between the Authority and the Company.

Real Estate Documents

- Regulatory Agreement (Extended Use Agreement) relating to the Project among the Washington State Housing Finance Commission (the “Commission”), the Authority and the Company;
- Ground Lease Agreement between the Authority and the Company;
- Memorandum of Ground Lease between the Authority and the Company;
- Priority and Subordination Agreement (Hilltop Lofts) among the Company, the Sponsor, the Department of Commerce, Tacoma Community Redevelopment Authority, Pierce County, Wells Fargo Bank, National Association, the Authority, the Commission, and Darin Davidson;
- Restated and Amended Declaration of Covenants and Conditions among the City of Tacoma, the Company, and the Authority;
- Parking Easement Agreement between the Authority and the Company; and
- One or more easement agreements pertaining to utility access.

CERTIFICATE

I, Michael Mirra, the duly chosen, qualified and Executive Director of the Housing Authority of the City of Tacoma (the “Authority”) and keeper of the records of the Authority, CERTIFY:

1. That the attached Resolution 2021-06-23 (6) (the “Resolution”) is a true and correct copy of the resolution of the Board of Commissioners of the Authority as adopted at a meeting of the Authority held on June 23, 2021 (the “Meeting”), and duly recorded in the minute books of the Authority;
2. That in accordance with RCW 43.06.220, and the Proclamations of the Governor of the State of Washington, as extended by the leadership of the Washington State Senate and House of Representatives (a) one or more options were provided for the public to attend the Meeting remotely, including by telephonic access, and (b) the means of attending the Meeting provided the ability for all persons attending the Meeting to hear each other at the same time;
3. The public was notified of access options for remote participation in the Meeting via public notice posted on THA’s website and social media platforms; and
4. The Meeting was duly convened and held in all respects in accordance with law, and to the extent required by law, due and proper notice of the Meeting was given; that a quorum was present throughout the Meeting through telephonic and/or internet means of remote access, and a majority of the members of the Board of Commissioners of the Authority present at the Meeting voted in the proper manner for the adoption of the Resolution; that all other requirements and proceedings incident to the proper adoption of the Resolution have been duly fulfilled, carried out and otherwise observed; and that I am authorized to execute this Certificate.

IN WITNESS WHEREOF, I have hereunto set my hand on June 23, 2021.

HOUSING AUTHORITY OF THE CITY
OF TACOMA

Michael Mirra, Executive Director

Resolution 7



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (7)

Date: June 23, 2021

To: THA Board of Commissioners

From: Michael Mirra
Executive Director

Re: Acquisition of the Unionaire Apartments by Condemnation or Negotiated Purchase
in Lieu Thereof

This resolution would authorize Tacoma Housing Authority (THA) to acquire the Unionaire Apartments (the “Property”) by condemnation or by negotiated purchase in lieu thereof, subject to final board approval.

Background

The Property is a 47-unit apartment complex located at 1902 S Union Avenue in Tacoma. The property currently offers rents that are affordable to households earning 60% to 120% of Area Median Income. It is located on S. Union Avenue near S. 19th Street, providing mass transit opportunities to residents. In particular, a Tacoma Link light rail station is planned at the intersection of those two streets. Based on preliminary investigation, the fair market value of the Property is approximately \$7,500,000.00. Based on the foregoing, and subject to satisfactory due diligence work still to be performed by THA, acquisition of the Property by THA would preserve vital affordable housing in Tacoma.

Recommendation

Approve Resolution 2021-06-23 (7), authorizing THA to declare the acquisition of the Property as necessary to fulfill THA’s public purpose of providing affordable housing and to direct the Executive Director of THA to acquire the Property by condemnation or by negotiated purchase in lieu thereof for an approximate sale price of \$7,500,000.00. Notwithstanding the foregoing, approval by the Board and by the Executive Director will be required before an offer of just compensation is made pursuant to condemnation or before, in connection with a negotiated purchase in lieu of condemnation, any earnest money becomes nonrefundable to THA.



TACOMA HOUSING AUTHORITY

RESOLUTION 2021-06-23 (7)

(Acquisition of the Unionaire Apartments by Condemnation or Negotiated Purchase in Lieu Thereof)

A **RESOLUTION** of the Board of Commissioners of the Housing Authority of the City of Tacoma

Whereas, there is a critical shortage of modestly priced rental housing in the City of Tacoma; and

Whereas, the Housing Authority of the City of Tacoma (“THA” or “the Housing Authority”) is charged with addressing pursuant to its mission of providing quality affordable housing opportunities equitably distributed within the City of Tacoma; and

Whereas, it is a goal of local government and the Housing Authority to further fair housing in the region affirmatively, in part through preservation of existing affordable housing opportunities in areas with significantly appreciating housing costs; and

Whereas, the Unionaire Apartments (the “Property”) is a 47-unit apartment complex located at 1902 S Union Avenue, Tacoma, Washington, in an area of Tacoma where rents are increasingly unaffordable to low-income households; and

Whereas, there is a growing loss of affordable housing within transit corridors and around high capacity transit in Tacoma; and

Whereas, the Housing Authority has identified acquiring and developing housing along planned mass transit corridors and areas with frequent high capacity transit as a strategic priority to ensure the long-term availability of low-income housing near reliable public transportation; and

Whereas, the Property is located within a transit corridor and close to high capacity mass transit where rents are increasingly unaffordable to low-income households; and

Whereas, RCW 35.82.070(2) provides, in part, that a housing authority shall have the power to acquire housing projects within its area of operations, and RCW 35.82.070(5) authorizes a housing authority to acquire real property by exercise of the power of eminent domain or by purchase in lieu of exercise of the power of eminent domain; and

Whereas, acquisition of the Property by the Housing Authority will serve the mission of the Housing Authority and the housing goals of the region through an approach that is considerably less expensive than constructing the same number of new housing units; now, therefore, be it

Resolved by the Board of Commissioners of the Housing Authority of the City of Tacoma, Washington as follows:

Section 1: Acquisition of the Property by the Housing Authority is necessary to preserve and provide housing for persons of low income that is equitably distributed in various areas of its

operations and in areas of high opportunity, high and escalating rents, and good mass transit in particular.

Section 2: The Board of Commissioners hereby authorizes the Executive Director (i) to give notice to the current owner of the Property of the Housing Authority's intention to acquire the Property by eminent domain if it is unsuccessful in acquiring the Property on satisfactory terms through negotiation and purchase in lieu of condemnation; and (ii) subject to the terms below, to acquire the Property by condemnation through exercise of the Housing Authority's power of eminent domain, if it is unsuccessful in acquiring the Property on satisfactory terms through negotiation with and purchase from the owner in lieu of condemnation.

Section 3: The Executive Director is hereby vested with the authority, and with discretion in the exercise of such authority, to negotiate the terms of an agreement to purchase for the Property at a price of approximately Seven Million, Five Hundred Thousand Dollars (\$7,500,000) and to pay into the purchase escrow the earnest money deposit for the purchase of the Property.

Section 4: If the Executive Director is successful in negotiating the terms of an agreement for the purchase of the Property, then the Executive Director is authorized and directed to execute the same. Following reviewing the results of inspection of the Property and other due diligence, and prior to any earnest money becoming nonrefundable to the Housing Authority, the Executive Director shall make a recommendation to the Board of Commissioners as to whether to proceed with closing the purchase of the Property. If the Executive Director recommend proceeding and the Board of Commissioners approves of the same, then the Executive Director shall be authorized to take any and all actions necessary to close on the purchase of the Property on the terms approved by the Board of Commissioners.

Approved: June 23, 2021

Stanley Rumbaugh, Chair