



# **TACOMA HOUSING AUTHORITY**

## **BOARD OF COMMISSIONERS**

### **BOARD PACKET**

**April 27, 2022**



# TACOMA HOUSING AUTHORITY

## AGENDA REGULAR BOARD OF COMMISSIONERS MEETING APRIL 27, 2022, 2022, 4:45 PM

Zoom: <https://us02web.zoom.us/j/85288412040> / Meeting ID: 852 8841 2040 / Dial: (253) 215-8782

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- 1. CALL TO ORDER**
  - 2. ROLL CALL**
  - 3. APPROVAL OF MINUTES**
    - 3.1 Minutes of October 8, 2021—Study Session
    - 3.2 Minutes of March 18, 2022—Study Session
    - 3.3 Minutes of March 23, 2022—Regular Session
  - 4. GUEST COMMENTS**
  - 5. COMMITTEE REPORTS**
    - 5.1 Real Estate Development Committee
    - 5.2 Finance and Audit Committee
    - 5.3 Community Partnerships and Advocacy Committee
    - 5.4 Education, Housing, Services and Partnerships Committee
    - 5.5 Diversity, Equity, Inclusion and Belonging Committee
  - 6. COMMENTS FROM THE EXECUTIVE DIRECTOR**
  - 7. ADMINISTRATION VERBAL REPORTS**
    - 7.1 Finance
    - 7.2 Policy, Innovation and Evaluation
    - 7.3 Administrative Services
    - 7.4 Client Support and Empowerment
    - 7.5 Rental Assistance
    - 7.6 Property Management
  - 8. NEW BUSINESS**

|      |                 |  |
|------|-----------------|--|
| 8.1  | 2022-04-27 (1)  | Extension of Crosspointe PBS Contract  |
| 8.2  | 2022-04-27 (2)  | Extension of Highland Flats PBS Contract   |
| 8.3  | 2022-04-27 (3)  | Revisions to THA's Admin Plan: Local Preferences   |
| 8.4  | 2022-04-27 (4)  | Extension of Parkland Manor PBVASH Contract  |
| 8.5  | 2022-04-27 (5)  | Extension of MDC Pacific Courtyard PBV VASH Contract   |
| 8.6  | 2022-04-27 (6)  | Interlocal Agreement with Housing Authority of Southwest Washington for JH Brawner Consulting Services |
| 8.7  | 2022-04-27 (7)  | Sunsetting the Housing Opportunity Program (HOP)   |
| 8.8  | 2022-04-27 (8)  | Exley and St. Helens Project-based Voucher Contracts   |
| 8.9  | 2022-04-27 (9)  | Approval of Remote Work Policy   |
| 8.10 | 2022-04-27 (10) | Emergency Mitigation Services  |
  - 9. EXECUTIVE SESSION:** Discuss pending legal claim.
  - 10. COMMENTS FROM THE COMMISSIONERS**
  - 11. ADJOURNMENT**





**Tacoma  
Housing  
Authority**

**Executive Director**  
April Black

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

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## **REGULAR MEETING Board of Commissioners**

### **WEDNESDAY APRIL 27, 2022**

The Board of Commissioners of the Housing Authority of the City of Tacoma will hold a Regular Meeting on **Wednesday, April 27, 2022, at 4:45 pm via Zoom.**

<https://us02web.zoom.us/j/85288412040> / Meeting ID: 852 8841 2040 / 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.

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I, Sha Peterson, certify that on or before April 20, 2022, I FAXED/EMAILED, the preceding PUBLIC MEETING NOTICE before:

|                                  |   |  |
|----------------------------------|---|--|
| <b>City of Tacoma</b>            | 747 Market Street, Room 800<br>Tacoma, WA 98402                 | <a href="mailto:CityClerk@cityoftacoma.com">CityClerk@cityoftacoma.com</a>             |
| <b>Northwest Justice Project</b> | 715 Tacoma Avenue South<br>Tacoma, WA 98402                     |  |
| <b>KCPQ-TV/Channel 13</b>        | 1813 Westlake Avenue North<br>Seattle, WA 98109                 | <a href="mailto:tips@q13fox.com">tips@q13fox.com</a>                                   |
| <b>KSTW-TV/CW 11</b>             | 1715 East Madison Street<br>Seattle, WA 98122                   | <a href="mailto:cw11@kstwtv.com">cw11@kstwtv.com</a>                                   |
| <b>KNKX</b>                      | 930 Broadway<br><br>Tacoma, WA 98402                            | <a href="mailto:info@knkx.org">info@knkx.org</a>                                       |
| <b>Tacoma News Tribune</b>       | 1950 South State Street<br>Tacoma, WA 98405                     | <a href="mailto:matt.driscoll@thenewstribune.com">matt.driscoll@thenewstribune.com</a> |
| <b>The Tacoma Weekly</b>         | 6812 27 <sup>th</sup> Street West<br>University Place, WA 98466 |  |

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

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Sha Peterson  
Executive Administrator



# **TACOMA HOUSING AUTHORITY**

## **MINUTES**



# TACOMA HOUSING AUTHORITY

## BOARD OF COMMISSIONERS MEETING MINUTES SPECIAL SESSION FRIDAY, OCTOBER 8, 2021

The Commissioners of the Housing Authority of the City of Tacoma met in Special Session via Zoom at 12:00 PM on Friday, October 8, 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 12:01 pm.

### 2. ROLL CALL

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

| PRESENT  | ABSENT  |
|--|---|
| <b>Commissioners</b>   |   |
| Chair Stanley Rumbaugh   |   |
| Vice Chair Shennetta Smith   |   |
| Commissioner Derek Young   |   |
| Commissioner Dr. Minh-Anh Hodge                                    |   |
| Commissioner Pastor Michael Purter                                 |   |
| <b>Staff</b>   |   |
| April Black, Interim Executive Director                            |   |
| Sha Peterson, Executive Administrator                              |   |
| Julie LaRocque, Interim Deputy Executive Director                  |   |
| Richard Deitz, Interim Finance Director                            |   |
| Barbara Tanbara, Interim Human Resources Director                  |   |
|  | Frankie Johnson, Property Management Director |
| Roberta Schur, Interim Real Estate Development Director            |   |
| Sandy Burgess, Administrative Services Director                    |   |
| Aley Thompson, Interim Rental Assistance Director                  |   |
| Cacey Hanauer, Client Support and Empowerment Director             |   |
| Katie Escudero, Interim Policy, Innovation and Evaluation Director |   |

Chair Rumbaugh declared there was a quorum present @ 12:02 pm and proceeded.

### 3. EXECUTIVE SESSION

The board took comments from staff and the community through September 27, 2021. The Commissioners have had the opportunity to read and consider those comments.

The Board went into executive session at 12:01 pm for 52 minutes to discuss the job qualifications of the individual for public employment for Tacoma Housing Authority and came back to regular session at 12:53 pm

Commissioner Young motioned to revoke the vote for the Executive Director position on September 10, 2021. Commissioner Hodge seconded.

Upon roll call, the vote was as follows:

|          |      |
|----------|------|
| AYES:    | 5    |
| NAYS:    | None |
| Abstain: | None |
| Absent:  | None |

**Motion Approved:** October 8, 2021

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Stanley Rumbaugh, Chair

Commissioner Hodge motioned to offer the Executive Director position to April Black and begin negotiations. Vice Chair Smith seconded.

Upon roll call, the vote was as follows:

|          |      |
|----------|------|
| AYES:    | 5    |
| NAYS:    | None |
| Abstain: | None |
| Absent:  | None |

**Motion Approved:** October 8, 2021

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Stanley Rumbaugh, Chair

### 10. ADJOURNMENT

There being no further business to conduct, the meeting ended at 1:00 pm.

**APPROVED AS CORRECT**

**Adopted:** October 27, 2021

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Stanley Rumbaugh, Chair



# TACOMA HOUSING AUTHORITY

## BOARD OF COMMISSIONERS MEETING MINUTES STUDY SESSION FRIDAY, MARCH 18, 2022

The Commissioners of the Housing Authority of the City of Tacoma met in Study Session via Zoom at 12:00 pm on Friday, March 18, 2022.

### 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 12:06 pm.

### 2. ROLL CALL

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

| PRESENT   | ABSENT   |
|---|--|
| <b>Commissioners</b>  |  |
| Chair Stanley Rumbaugh<br>(arrived late at 12:25 pm)                  |  |
|   | Vice Chair Shennetta Smith                           |
| Commissioner Derek Young  |  |
| Commissioner Dr. Minh-Anh Hodge                                       |  |
|   | Commissioner Pastor Michael Purter                   |
| <b>Staff</b>  |  |
| April Black, Executive Director                                       |  |
| Sha Peterson, Executive Administrator                                 |  |
| Julie LaRocque, Interim Deputy<br>Executive Director                  |  |
| Richard Deitz, Interim Finance Director                               |  |
|   | Sharrall Madden, Interim Human<br>Resources Director |
| Marquis Jenkins, Interim Property<br>Management Director              |  |
| Sandy Burgess, Administrative Services<br>Director                    |  |
| Aley Thompson, Interim Rental<br>Assistance Director                  |  |
| Cacey Hanauer, Client Support and<br>Empowerment Director             |  |
| Katie Escudero, Interim Policy,<br>Innovation and Evaluation Director |  |

Chair Rumbaugh declared there was a quorum present @ 12:07 pm and proceeded.

### **3. Diversity, Equity and Inclusion (DEI) with The Lindsay Group (TLG)**

TLG provided their DEI process to the board including diagnostic interviews and organizational surveys. They have analyzed the collected information that they will share through a comprehensive report which will demonstrate areas of change. The TLG process involves deep critical thinking and participation to help build confidence and encourages participants to learn from their mistakes through simulations with different topics of oppression. Part of the plan is to coach leaders through the process of transformation.

Board participation is expected especially in the Leadership and Development programming. The board is excited to learn where THA is in the evaluation.

### **10. ADJOURNMENT**

There being no further business to conduct, the meeting ended at 12:55 pm.

**APPROVED AS CORRECT**

**Adopted:** March 23, 2022

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Stanley Rumbaugh, Chair



# TACOMA HOUSING AUTHORITY

## BOARD OF COMMISSIONERS MEETING MINUTES REGULAR SESSION WEDNESDAY, MARCH 23, 2022

The Commissioners of the Housing Authority of the City of Tacoma met in Regular Session via Zoom at 4:45 PM on Wednesday, March 23, 2022.

### 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 4:47 pm.

### 2. ROLL CALL

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

| PRESENT  | ABSENT                             |
|--|------------------------------------|
| <b>Commissioners</b>   |                                    |
| Chair Stanley Rumbaugh   |                                    |
|  | Vice Chair Shennetta Smith         |
| Commissioner Derek Young   |                                    |
| Commissioner Dr. Minh-Anh Hodge                                    |                                    |
|  | Commissioner Pastor Michael Purter |
| <b>Staff</b>   |                                    |
| April Black, Executive Director                                    |                                    |
| Sha Peterson, Executive Administrator                              |                                    |
| Julie LaRocque, Interim Deputy Executive Director                  |                                    |
| Rich Deitz, Interim Finance Director                               |                                    |
| Sharrall Madden, Interim Human Resources Director                  |                                    |
| Frankie Johnson, Property Management Director                      |                                    |
| Sandy Burgess, Administrative Services Director                    |                                    |
| Aley Thompson, Interim Rental Assistance Director                  |                                    |
| Cacey Hanauer, Client Support & Empowerment Director               |                                    |
| Katie Escudero, Interim Policy, Innovation and Evaluation Director |                                    |

Chair Rumbaugh declared there was a quorum present @ 4:48 pm and proceeded.

### 3. APPROVAL OF MINUTES OF THE PREVIOUS MEETING

Chair Rumbaugh asked for any corrections to or discussion of minutes for the Regular Session of the Board of Commissioners for Wednesday, February 23, 2022.

Commissioner Young moved to adopt the minutes. Commissioner Hodge seconded.

Upon roll call, the vote was as follows:

|          |      |
|----------|------|
| AYES:    | 3    |
| NAYS:    | None |
| Abstain: | None |
| Absent:  | 2    |

**Motion approved.**

### 4. GUEST COMMENTS

None.

### 5. COMMITTEE REPORTS

***Real Estate Development Committee—Chair Rumbaugh, Commissioner Young***

Chair Rumbaugh was unable to attend the meeting, but Commissioner Young provided an update. The committee did meet and discussed Housing Hilltop, focusing on first designs and how and when they should be shared with the board for initial feedback. Executive Director Black added that THA is trying to get feedback from all departments before designs will be presented to the board. The committee is again having discussions regarding negotiations with Highland Court. Nothing needs to go back to the board at this time. Finally, the committee is discussing potential acquisition on the eastside and more information will be provided at a later date.

***Finance Committee—Commissioner Hodge and Commissioner Young***

The committee did not meet.

***Education, Housing Services and Partnerships Committee—Vice Chair Smith, Commissioner Hodge***

The committee met yesterday and spent the entire time listening to the preliminary report from The Lindsay Group. This report will be discussed during the ED Comments portion.

***Community Partnerships and Advocacy Committee—Vice Chair Smith, Commissioner Purter***

Both Vice Chair Smith and Commissioner Purter were not in attendance.

***Diversity, Equity and Inclusion Committee—Vice Chair Smith, Commissioner Hodge***

An update will be provided by The Lindsay Group during the ED Comment portion.



## 6. COMMENTS FROM THE EXECUTIVE DIRECTOR

Executive Director (ED) April Black directed the board to her report. The federal fiscal year budget for 2022 finalized and THA will be receiving an increase in funding. THA and Forterra worked together for a Hilltop Walking Tour with Derek Kilmer. The event will be at the old Rite Aid building tomorrow around 2:30 pm, with a reception to follow at 3 pm to thank him for securing the funds. Commissioner Hodge will be presenting on behalf of the THA Board.

ED Black sent an email to staff regarding reopening THA lobbies. The overview includes staff returning to the building with a hybrid schedule on April 25<sup>th</sup>, and visitors by appointment. Chair Rumbaugh inquired about security. There is no security, but staff will monitor safety around the building responded ED Black.

ED Black will send an email to the board and staff regarding the new Finance Director. There were three separate panels for the hiring process. Interim Finance Director Richard Deitz will be moving into an associate director role. He has been doing an incredible job leading the finance team in transition. “Rich, you stepped up big time,” added Chair Rumbaugh. “Thank you.”

The Yardi kick-off was held March 16, which was a great celebration with a look ahead on how staff can better serve customers. The path THA took analyzing what is needed and how to support staff was an extensive one, but THA is moving in the right direction and ED Black is grateful for everyone’s work. This will be a 12- to 18-month process with a roll out of September 2023. “This is an unusual type of software, but Yardi is a good product,” advised Director Burgess.

THA staff are focusing on late rent payments. There are staggering unpaid rent within the portfolio. THA hired an eviction specialist, and an announcement will be going out to staff. The position will be supporting the property management department. There has been an internal team who had been working for two years led by Director Thompson, with the assistance from other departments.

### **The Lindsay Group (TLG) Update**

TLG provided context for their methodology and findings. They will present their preliminary finding from the organizational assessment. Next steps will be moving THA to an anti-oppressive program where they provide very immersive engaging learning experiences to help staff gain education around DEIB topics and create space to develop a shared language. They will then begin moving THA through an intentional strategic planning process. They are seeing a need for systematic change.

### *Questions and Comments from the Board:*

- Commissioner Hodge: She is part of the DEIB committee and has taken time to read the report. She is wondering if TLG can share specific comments regarding the lack of trust from leadership. Asian respondents according to her was very

small. She also wanted to know the positions of those who responded to the survey.

- Chair Rumbaugh: Asked for feedback and reflection as the weeks and months roll by so the board can address them in an open and straightforward way. He thanked TLG for their effort and thorough report.
- Commissioner Young: He appreciates a frequency of reports/findings. Dr. Lindsay will provide reports as data emerges. The frequency has yet to be determined and he hesitates to commit to the frequency on reporting.

## **7. ADMINISTRATIVE REPORTS**

### **Finance**

Finance Department (FD) Interim Director Rich Deitz directed the board to the finance report. THA submitted REAC which was due March 15<sup>th</sup>. Current expenditures are similar to last year, Moving to Work (MTW) cash is up \$200k. Unencumbered is at \$21.8M, down \$1.3M.

Commissioner Hodge moved to ratify the payment of cash disbursements totaling \$5,918,941 for the month of February 2022. Commissioner Young seconded.

Upon roll call, the vote was as follows:

|          |      |
|----------|------|
| AYES:    | 3    |
| NAYS:    | None |
| Abstain: | None |
| Absent:  | 2    |

|                         |
|-------------------------|
| <b>Motion Approved.</b> |
|-------------------------|

### **Administrative Services**

Administrative Services (AS) Director Sandy Burgess provided an updated on the Yardi implementation. She thanked her IT team and Woodson Baldwin who is always participating in board meetings to make sure nothing goes wrong. The AS team is conducting a physical needs assessment on the property to monitor what they need and plan for expenses. There have been staffing changes in compliance for 2021. The AS team audited 500 files in 2021, including for Arlington lease up. They also monitored Housing and Urban Development (HUD) waivers in the year. Staff are now returning to reviewing 10% of files across the portfolio on a quarterly basis. James Center North is selling two parcels, one to Koz and the other to Mercy Housing. Hilltop Lofts is under construction and 902 1<sup>st</sup> floor is complete and staff are moving back in the office.

## Client Support and Empowerment

Client Support and Empowerment (CSE) Director Cacey Hanauer directed the board to her report. She thanked her team for their hard work. Rob MacAfee has been hired as the Salishan Community Builder. There are currently still two positions open in CSE. Staff are deep in summer planning mode, bringing on robust planning for community events. A new chart on the CSE report shows the difference on CSE's pull on Moving to Work (MTW) funding. Chair Rumbaugh inquired about camp/childcare to residents for the summer. According to Director Hanauer, she is hopeful that there would be more robust work with other providers for this kind of service.

## Rental Assistance

Rental Assistance (RA) Interim Director Aley. Utilization is at 100%. She is grateful for her colleagues and staff including Nando Ruiz and Adam Ydstie for their facilitation skills. RA staff are focusing on onboarding housing specialists. Emergency Housing Voucher is up 13% from last month. The Foster Youth Independence program is effective this month with six complete referrals to issue vouchers thanks to Amber Prentice. Amber also leveraged the relationship with the HUD who allowed hospitals to be NED eligible.

## Property Management

Property Management (PM) Director Frankie Johnson directed the board to her report. She thanked her team who continue to amaze her for their performance every month. She also thanked her colleagues for their support while she was on leave. PM staff hired Brian Medina as a new maintenance staff at Salishan, Angel Foley now a regular employee as maintenance tech, and Sherri Tift now the property operations manager. The PM staff has been working on projects to engage tenants. She thanked the CSE partnership. Finally, Director Johnson thanked Marquis Jenkins who has done an amazing job throughout these last few months. She definitely stepped up.

## 8. NEW BUSINESS

### 8.1 RESOLUTION 2022-03-23 (1) (Wise Consulting Services Contract for Yardi)

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 ("Tacoma Housing Authority" or "Authority") has substantial needs for application software for the administration of its operations, all to better serve its low and moderate-income housing community and other services through the various programs administered by the Authority; and

**WHEREAS,** The Authority has engaged in a multi-year effort to identify and procure necessary system software, cloud services, support, and training, including installation, maintenance and service of hardware and software. That effort has included evaluation by Authority-wide personnel of many vendors, services and programs, and government service providers under federal and local programs; and

**WHEREAS,** The costs associated with this contract are within the overall Yardi implementation budgeted for 2022; now, therefore, be it

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

Approve THA's Executive Director entering a contract with Wise Consulting Services.

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

AYES: 3  
NAYS: None  
Abstain: None  
Absent: 2

**Motion Approved:** March 23, 2022

\_\_\_\_\_  
Stanley Rumbaugh, Chair

**8.2 RESOLUTION 2022-03-23 (2)**  
**(Pierce County Contract for Tacoma Schools Housing Assistance Program)**

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

**WHEREAS,** THA, TPS, and Pierce County Human Services share a vested interest to serve families with children and improve outcomes for students and the schools that serve low-income families; and

**WHEREAS,** The contract has been rewritten to extend the term through 2022; and

**WHEREAS,** The contract will be in effect through December 2022; 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 extend the Pierce County contract for housing for the Tacoma Schools Housing Assistance Program.

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

Upon roll call, the vote was as follows:

|          |      |
|----------|------|
| AYES:    | 3    |
| NAYS:    | None |
| Abstain: | None |
| Absent:  | 2    |

**Motion Approved:** March 23, 2022

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Stanley Rumbaugh, Chair

## **9. COMMENTS FROM COMMISSIONERS**

Chair Rumbaugh announced that the City of Destiny dinner for historical society is scheduled for April 2<sup>nd</sup>. They will be featuring Salishan and some of the people involved. According to ED Black, there are still a few spots set aside for THA staff.

Chair Rumbaugh thanked staff on behalf of the board.

## **11. ADJOURNMENT**

There being no further business to conduct the meeting ended at 6:30 pm.

**APPROVED AS CORRECT**

**Adopted:** April 27, 2022

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Stanley Rumbaugh, Chair



# **TACOMA HOUSING AUTHORITY**

## **Real Estate Development Committee**

Chair Stanley Rumbaugh  
Commissioner Derek Young  
April Black  
Roberta Schur  
Sandy Burgess  
Richard Deitz

## **Finance Committee**

Commissioner Derek Young  
Commissioner Minh-Anh Hodge  
April Black  
Richard Deitz  
Duane Strom

## **Community Partnerships Committee**

Vice Chair Shennetta Smith  
Commissioner Pastor Michael Purter

## **Education Committee**

Vice Chair Shennetta Smith  
Commissioner Minh-Anh Hodge  
April Black  
Katie Escudero

## **Diversity, Equity and Inclusion Committee**

Vice Chair Shennetta Smith  
Commissioner Minh-Anh Hodge  
Cacey Hanauer  
Frankie Johnson



**TACOMA HOUSING AUTHORITY**

**COMMENTS FROM THE  
EXECUTIVE DIRECTOR**



# TACOMA HOUSING AUTHORITY

**To:** THA Board of Commissioners  
**From:** April Black, Executive Director  
**Date:** April 27, 2022  
**Re:** Executive Director's Monthly Report

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The great work of the Tacoma Housing Authority (THA) staff will be reported by the Department Directors. The Executive Director report attempts to provide high-level agency updates to supplement department reports.

This report also includes items that might raise questions by the Board. I attempt to provide more detail but will be ready to answer questions you might have. If any department reports raise any concerns for you, I am happy to address them.

## **1. Anti-Oppression, Diversity, Equity, Inclusion, and Belonging**

Based on feedback from staff and Board, we requested edits to the Organizational Assessment that The Lindsay Group (TLG) presented at the March Board meeting. The revised report is attached.

The intent of our work with TLG is to make THA a better place to work, a better provider of housing and services, a better community partner, and break down oppressive and racist systems. This means we need to both learn and act. Over the month of April, each department will discuss the organizational assessment and seek feedback about what our short-term and long-term priorities should be in response to the assessment. We will discuss and prioritize the feedback in an agency-wide meeting in early May. Results of those discussions will be presented in the May Board meeting.

Based on feedback from staff about the last Townhall meeting, we are sensitive to providing all staff with a safe space to learn and develop knowledge of oppression, racism, and how we can collectively impact change. The newly formed staff Steering Committee and Leadership Team will be the first cohort to participate in the TLG Learning and Development course. This will give us an opportunity to observe the structure and provide feedback before the rest of the agency participates.

The Lindsay Group is requesting that we select a date for a Board retreat. They are requesting (2) 2-hour meetings or (1) 4-hour meeting. I have attached the outline of those sessions for reference. Let's work together to find a date or dates that will work in May or June.

## **2. FY2023 Community Project Funding Requests**

Congressional members are accepting proposals for Community Project Funding Requests that could be included in the FY2023 budget. THA submitted one request and supported three partner requests. I describe each of these requests below and attached the letters of support we submitted on behalf of the partner projects. I encourage you to advocate for any of these funding requests.



### *2.1. Aviva Crossing Storm Water and Sanitary Sewer Infrastructure*

Infrastructure improvements are required to building housing at Aviva Crossing. We have requested \$2 million from the FY2023 budget to help offset the cost.

### *2.2. Tacoma Community College's "Student Housing Center" Project*

Tacoma Community College (TCC) is planning to repurpose one of its on-campus buildings to house TCC students experiencing homelessness. The Congressional request will assist with the costs of rehabbing the building for this purpose, purchasing "pods" for students to live in, and paying for on-site supportive services.

### *2.3. Asia Pacific Cultural Center's (APCC) Renovation and Expansion of its South Park Community Center*

Expansion of this community center will allow more appropriate space for Asian and Pacific Islander communities to gather, celebrate and showcase their cultures. With this expansion, APCC plans to expand its senior and community activities and will serve as a useful referral source for many THA customers.

### *2.4. Foundation for Tacoma Students' Shared Childcare Services Model*

THA has been a partner on this project since initial planning. Their \$1.6 million request would support planning and implementation of a pilot shared services model at Salishan. Activities would include:

- A provider needs assessment
- Identification of a hub organization and alliance members
- Development of a business plan
- Choosing a shared software and data management tool
- Covering one-time start-up or business stabilization costs for childcare providers
- Investing in professional development opportunities for childcare professional staff
- Investing in whole family supports and services such as multi-generational community building and resident advocacy, incentivized family-centered goal planning, and direct linkages to employment and financial coaching, income supports, physical, social and emotional well-being supports, and other supports deemed necessary by community feedback.

## **3. Housing Hilltop**

Updated construction numbers for Housing Hilltop are in. The total development costs have grown significantly since we started. Staff originally estimated construction at about \$290,000 per unit. We are now looking at numbers that are closer to \$305,000, for construction only. Total

development costs, including all costs, such as utilities, insurance, developer fee, inspections, etc., will make that number higher.

Increased construction numbers show a roughly \$15M gap over the December pro forma. This gap can be filled with some combination of project-based vouchers, an increased contribution of THA funds, further fundraising, and/or renegotiating Amazon financing. We will share more information as we know more and will be in close consultation with the Board Development and Finance subcommittees.

Related to this project, there are a number of upcoming decisions for the Board.

- The population to be served. There will be a future proposal about whether to have a community preference (anti-displacement policy).
- What types of business will be prioritized in the commercial spaces?
- Whether THA will manage this property or use 3<sup>rd</sup> party management.
- The final financing package.
  - Investor/lender
  - Amazon debt
  - The THA financial contribution to the project.
  - Project based vouchers
- The name of the project.
- The final design.
- The MWBE and Section 3 hiring goals for the project and how that will be overseen and reported to the Board.

Within the Administrative Services report, you will see the design plans and proposed external facades for the properties. We are interested in your questions and feedback.

#### **4. Bank at Salishan**

Seattle Credit Union (SCU) has been selected to occupy the bank space at the Salishan Family Investment Center. They expect to move in in June. This is very exciting. Salishan and much of the Eastside has been without easy access to banking options since Heritage Bank moved out of the Family Investment Center.

This partnership would not have been possible without Karen Bunce's leadership on the effort to find a banking partner for Salishan that would meet the needs of our customers and share community values. This was a challenging task and Karen pressed forward with the support and partnership of the Salishan CSE and Property Management (PM) teams and the Salishan Association staff and Board. We often take banking or access to an ATM for granted. Banks take their staffing and profits into account with each decision to open a branch. Seattle Credit Union is not just making a financial commitment to open and staff a bank, they will install an ATM that is accessible 24-hours a day and provide banking products that are available and accessible to people of all income levels and credit histories. It took the vision and commitment of THA, Salishan Association, and SCU to find a banking partnership that could best serve our community.

## **5. New Director of Finance**

I am very happy to announce that we have selected Jorge Perez as THA's new Director of Finance. Jorge currently serves as the CFO for the Washington Bar Association. Jorge brings over 28 years of direct experience, of which more than 25 years he served at a senior and/or CFO level. His experience includes:

- Schering - Plough Corporation as the controller promoted to CFO World Wide Care Division.
- VP of Finance for Marriott International - Central Region promoted to Sr. VP of Finance of North American Lodging where he led a team of 16 people at the corporate offices and 4 regional CFO's. His focus was on delivering financial results, development and growth for over 800 managed hotels in North America and Canada.
- Serving as CFO of Holiday Retirement, Rural Metro Corporation and Car Toys.
- Earning his MA and BA in Economics at the University of Puerto Rico.

Jorge was born in New York City and lived there until he was 14. He then spent his formative years in Puerto Rico before moving to Japan for four years. Jorge has two adult children—Alyssa and Jared—and he is an avid Mets and Jets fan.

We had several qualified candidates for the position and difficult choices to make. A group of THA staff, leadership, and an Executive Director from another housing authority served on three separate panels to interview candidates. Jorge had strong support from the panels and we're excited to have him join our team. I will introduce him to you at the April Board meeting.

I also want to announce that in mid-May Rich Dietz will step into the Associate Director of Finance role. In this role, Rich will continue to lend his leadership and expertise within THA. Rich has been such an asset to our team, leading the budget processes, overseeing property financial performance, analyzing potential development and acquisition deals, mentoring and supporting the Finance team, and being a valuable member of the Leadership Team. Please help me express our gratitude to Rich for his time serving in the interim Finance Director role and congratulate him on his new role.

Finally, thank you to the Finance Team. This team has been through an incredible amount of transition over the last year. This team has been steadfast in maintaining our financial deadlines and processes, supporting staff and vendors, and training and cross-training each other as we've had promotions and changes in staff. Finance, we see you and we appreciate you!

## **6. New Director of Human Resources**

I am pleased to announce that we have selected Jeanne Thurston as THA's Director of Human Resources (HR). Jeanne comes with nearly twenty years' experience in Human Resources that includes work with local and federal governments. She is a US Navy Veteran who has committed her life's work to being a change agent. Jeanne has always believed "that public service must be more than doing a job efficiently and honestly. It must be an absolute dedication to the community that you serve and to the nation."

In her free time, Jeanne enjoys music, travelling and spending time with her family.

Jeanne was selected through an extensive internal interview process that represented staff from across the agency and the Leadership Team. During her interviews, Jeanne emphasized her desire to focus on recruitment and employee retention.

We will welcome Jeanne to the THA team on May 2<sup>nd</sup>. We will introduce her at the May Board meeting.

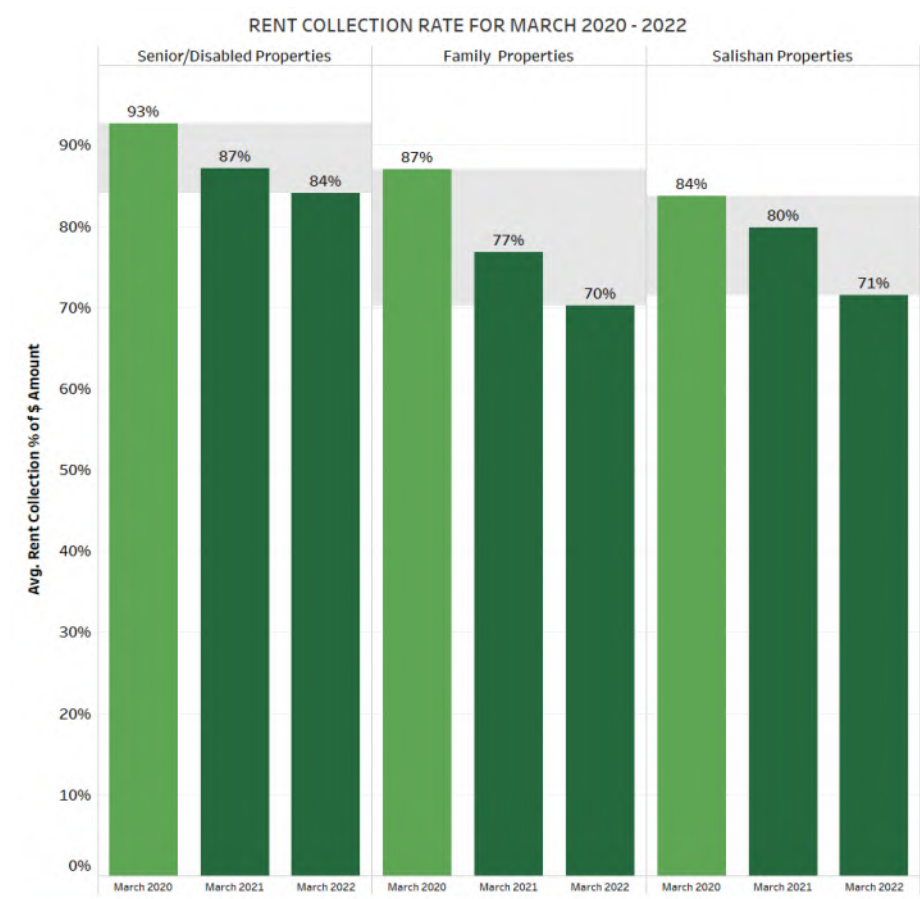
I also want to take this opportunity to thank Sharrall Madden for her leadership as the Interim Director of Human Resources. Sharrall has brought incredible patience, wisdom, and intelligence to this role. She has been steadfast in her leadership of the HR team and her partnership on the Leadership Team.

Thank you also to the Human Resources team!! This small but mighty team has been supporting our entire agency through tremendous change, within their department and throughout the organization. Thank you, Lynette, Destiny, and Cathy. We could not do this work without you!

## **7. Tenant Rent Payments and Unit Turns**

### *7.1. Tenant Rent Payments*

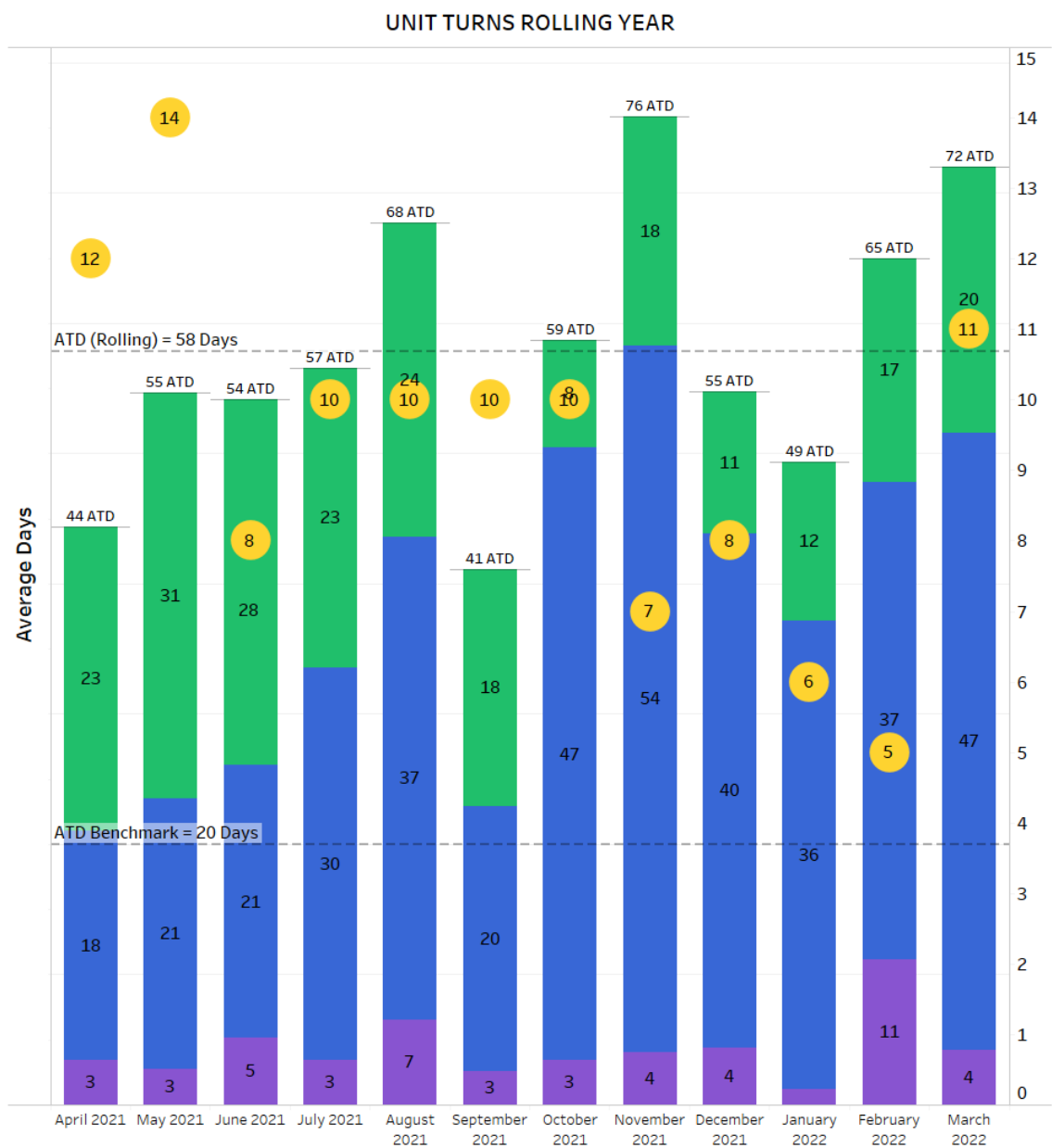
The following chart shows rent collection by property type over the last three years. The Rent Collection chart provides the average percent of rent collected through the last day of each reporting month by year and property group. If a unit is vacated and occupied by a new tenant within the same month, the chart will capture both the inactive (vacated tenant) and active ledger (new tenant) payments.



The chart above shows a significant increase in rent collection for the Family Properties over the last month. For reference we reported a collection of 56% for the month of January. Currently we are at 371 with late rent. The late rent team has been communicating with tenants owing rent and we hope to share some proposals related to this issue in May.

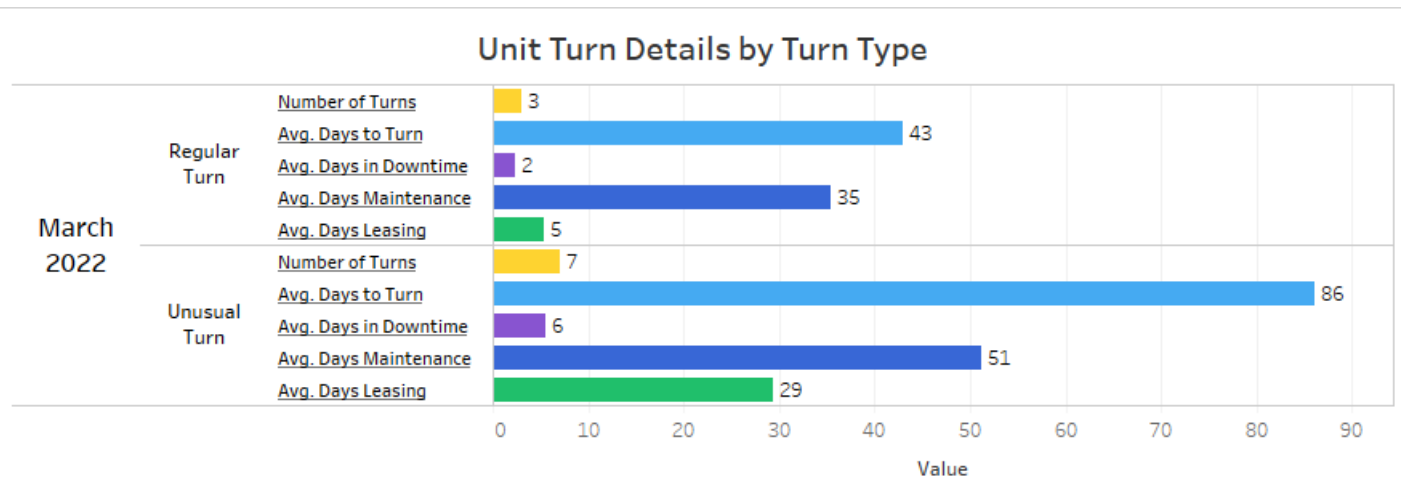
## 7.2. Vacant Unit Turn Status

As of month, ending March 31st, 2022



The following chart breaks apart the turns based on the turn type, regular or unusual. Three turns were for regular reasons, and averaged 43 key-to-key days, and 7 turns were unusual which averaged 86 key-to-key days. We are continuing to find ways to reduce overall key to key times. Leasing will soon transition to Rental Assistance to provide an overall support and better collaboration for the leasing team members. Turn days and processes are being evaluated for additional improvements.





In addition to centralizing our leasing staff within Rental Assistance, we are also adding a separate Maintenance Supervisor to the portfolio, considering a reorganization of the overall management structure within Property Management, and more clearly tying these performance metrics to the performance evaluations. Julie is taking a more active role in overseeing the unit turn times and is working with the team to remove days from the unit turn process.

There were some anomalies in our units turns in March.

- One unit had to be held offline based on advice from TPD because they had determined it was temporarily unsafe for THA staff or a future resident to be at the unit.
- 4 Households were approved to move into the unit and each of the 4 declined the unit which required leasing to have to start over each time.
- A Hazmat cleanup.
- After the death of a tenant, an unauthorized guest remained, and staff needed to work with that individual to move out before the turn could begin.

Overall, unit turns remain an ongoing challenge for us. We will continue to respond to and manage through unusual and anomolous circumstances while still driving for fewer days to turn. Getting units ready to lease is important to housing families on our waiting lists more quickly.



# 2022 PRELIMINARY ORGANIZATIONAL ASSESSMENT SUMMARY REPORT FOR THE TACOMA HOUSING AUTHORITY (ABRIDGED VERSION)

Prepared by

**THE LINDSAY GROUP CO.**  
AN ORGANIZATIONAL DEVELOPMENT CONSULTING FIRM

Presented

23 March 2022

Updated

26 April 2022



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# INTRODUCTION

The Lindsay Group (TLG) designed and implemented an organizational assessment process for the Tacoma Housing Authority (THA). This organizational assessment approach was multi-methodological. This means our research included the use of more than one method of data collection.

The goal of this summary report is:

- To provide written communication that presents our findings of THA in its current state.
- To identify the challenges that impede the transition to becoming an anti-oppressive organization.

This TLG Organizational Assessment Report presents the findings and insights gathered during the organizational assessment process. Our intention is to engage in discussion with THA in a way that embraces the data in this report and to provide information that would strategically and responsibly advance THA's continued organizational research and change efforts.

We hope this report will drive meaningful community level discussion resulting in positive organizational change for all THA stakeholders.

Our sincere thanks to the THA Community for their high level of engagement in this organizational assessment process. We know that with persisting racial animus and the circumstance of a seemingly unending pandemic, so many of you – if not all of you, are beyond exhausted and our organizational assessment process asked much of all of you. Despite the challenges you face in your work-lives and beyond, your collective resolve to engage in this first step towards organizational change was deeply inspiring. We offer our gratitude for courageously and vulnerably participating in this work.



# EXECUTIVE SUMMARY

THA is mission-oriented in its focus on advancing organizational change for diversity, equity, inclusion, and belonging. THA leadership recognizes the need for continuous data-informed change to improve the organization. TLG was commissioned to collect and analyze responses to a multi-method organizational assessment process, designed to inform strategic and community-centered change. The organizational assessment looked at key areas of organizational life at the individual, group, and system level to determine how THA's organizational challenges impact employees.

The executive summary is divided into two parts. In the first part, TLG's assessment team summarize the findings from the organizational assessment process. The second part summarizes our consultant recommendations, which aim to support, both short and long-term, plans for strategic change.

To learn more about THA's needs and challenges, TLG not only engaged employees in the organizational assessment process, we also facilitated a number of group activities and conducted a number of direct observations. What we discovered was that among THA employees is a strong desire for strategic action and change. We also recognized an urgency for prioritizing a community-based agenda for diversity, equity, inclusion, and belonging.

We encourage the organization to take time to reflect on the findings of our report. But most importantly, we encourage the organization to engage in strategic action planning to facilitate strategic change.

We strongly encourage you to review the detailed organizational assessment findings that are contained within the sections below this executive summary.

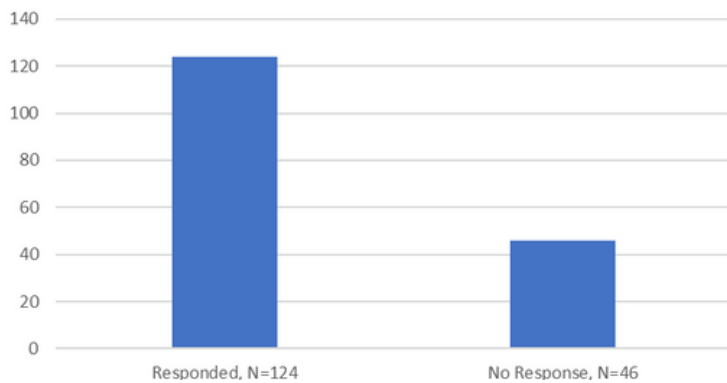


# OVERVIEW OF PARTICIPANT DEMOGRAPHICS

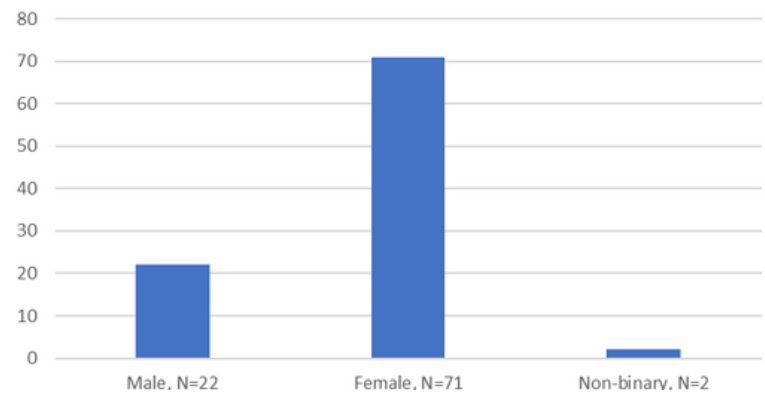
## Overview of Demographics

Demographic information was collected respecting participants' privacy and confidentiality to ensure that the assessment's sample results were representative of THA's population. Response rate, gender identity, ethnicity, and tenure within the organization are represented below.

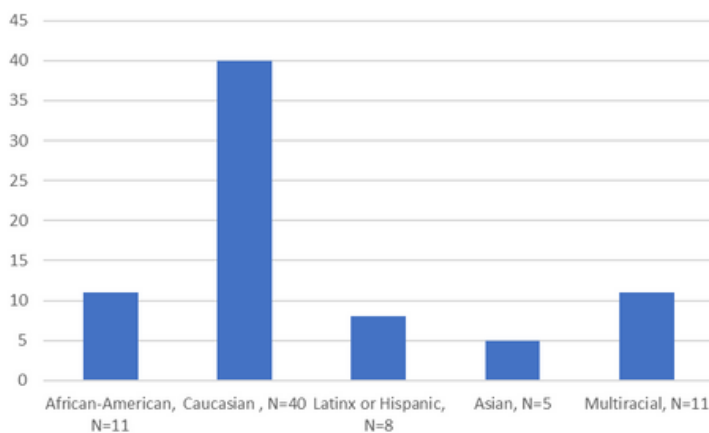
Response Rate



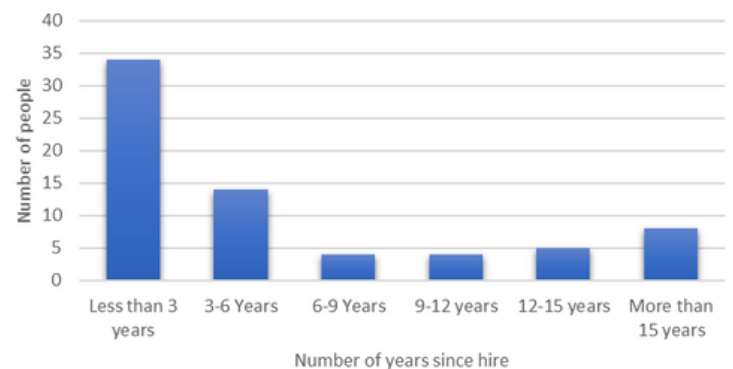
Gender



Ethnicity



Tenure



\* No Response group consists of people who received the link but never opened it.

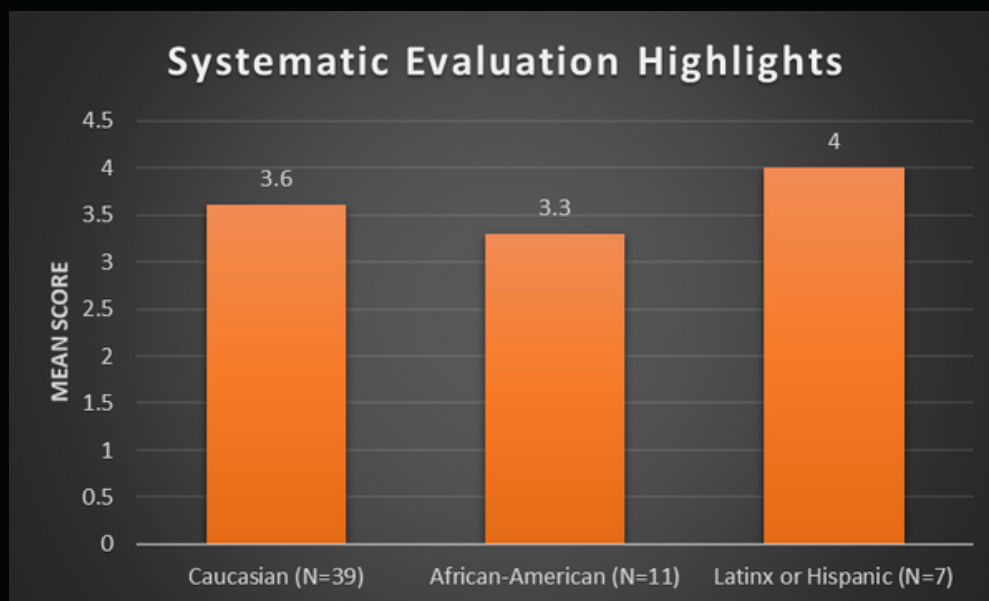
## Overview of Results of OAS

The overall results of the Organizational Assessment indicate that there are no statistically significant differences across groups<sup>\*\*</sup>. However, considering the high completion rate, simple **mean comparisons** in the ethnicity group and tenure group become meaningful. A 5-point Likert scale was utilized in the survey; it provided five possible answers to a statement or question and allowed respondents to indicate their strong agreement (5) - to strong disagreement (1) regarding the question or statement. Below are more specific analyses focusing on some constructs that we highlight as important<sup>\*\*\*</sup>. *Note: small group size could make interpretation misleading, and hence we have excluded some groups (i.e., Asian & Multiracial).*



### Systematic Evaluation (Concerns whether members are being systematically impacted)

We observed that the Caucasian group (M=**3.6**, n=**39**) reported higher systematic evaluation than the African-American group (M=**3.3**, n=**11**) but lower than the Latinx or Hispanic group (M=**4.0**, n=**7**). This suggests that the Latinx or Hispanic group views THA's system more positively than the Caucasian group and than the African-American group. A sample item is "For the most part, THA management has a clear understanding of my immediate needs and concerns at work", where the Caucasian group reported **3.5**, the African-American group reported **3.1**, and the Latinx or Hispanic group reported **4.2**.



<sup>\*\*</sup> participant responses were grouped by gender, ethnicity, and tenure

<sup>\*\*\*</sup> A score of 1-2.9 would be a low score, 3-3.9 would be moderate, and 4-5 would be high. M=Mean score, n=Number of responses

## Overview of Results of OAS



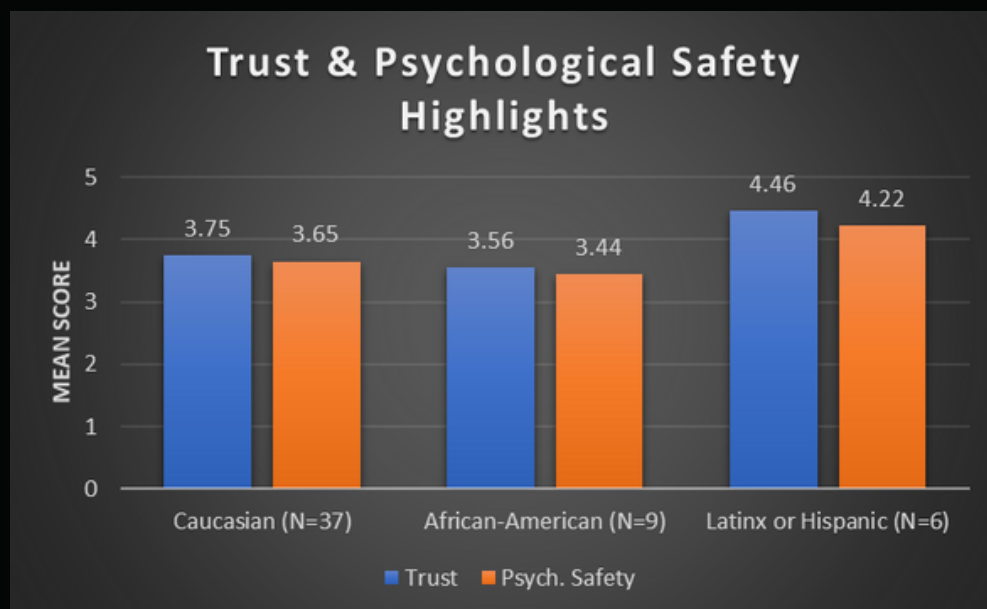
**Trust & Psychological Safety** is about whether members feel safe and trustful.

We observed that the Latinx or Hispanic group ( $M=4.46$ ,  $n=6$ ) reported higher Trust than the Caucasian group ( $M=3.75$ ,  $n=37$ ) and the African-American group ( $M=3.56$ ,  $n=9$ ), as well as Psychological Safety where the Latinx or Hispanic group ( $4.22$ ) reported higher Trust than the Caucasian group ( $3.65$ ) and the African-American group ( $3.44$ ). These indicate that the Latinx or Hispanic group perceived the strongest support from their supervisors/colleagues and perceived higher levels of psychological safety and trust.



**Traumatization** is about the extent to which members have experienced trauma.

All groups reported Trauma in the neutral range ( $3.0 \sim 3.2$ ). This suggests that employees from THA are generally moving away from previous events that could result in trauma. It is essential to remember that traumatization is not always reflected in organization-wide surveys, as these experiences frequently occur to only a small subset of stakeholders. It is recommended to rely more on structured interview results to understand employee traumatization better.



\*\* participant responses were grouped by gender, ethnicity, and tenure

\*\*\* A score of 1-2.9 would be a low score, 3-3.9 would be moderate, and 4-5 would be high. M=Mean score, n=Number of responses



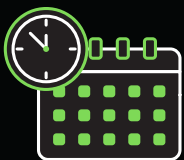
**Correlation: Social Attitudes & Bias** is about the extent to which members perceive attitudes and biases influence organizational behavior.

A correlation between Social Attitudes and Bias was observed concerning its relationship to the variable, Resistance to Change ( $r=-0.24$ ). This correlation suggests that the more biases employees perceive in the workplace, the more they would welcome change. This finding further signifies the urgency and desire for change confirms the importance of THA's commitment to becoming an anti-oppressive organization and advancing diversity, equity, inclusion, and belonging across the organization's ecology.



**Correlation: Systematic Evaluation Correlations** is about whether members are being adversely impacted by systemic or organizational level decision-making.

We observed a correlation between Systematic Evaluation and Psychological Safety ( $r=0.54$ ), Trust ( $r=0.61$ ), Trauma ( $r=-0.3$ ), and Hope ( $r=0.3$ ). This is expected, as those who are not systematically oppressed should feel more psychologically safe, perceive more trust, less trauma, and hold more optimism. This finding further confirmed that it is important for THA to consider systematic changes to better help employees combatting potential trauma.



**Correlation: Tenure Correlations** is about understanding employee perceptions of THA over their course career.

We also observed a correlation between Tenure and Systematic Evaluation ( $r=-0.3$ ) and Trust ( $r=-0.3$ ). This is a signal that demands action, as this is indicating that, as employees stay longer with THA, they evaluate the THA system more negatively and trust their supervisor/colleagues less. Our facilitation team is aware of this. In fact, addressing this as well as other aforementioned concerns is well within the scope of the partnership between The Lindsay Group and THA.

\*\*\* all correlations presented here are statistically significant

In addition, an absolute  $r$  value below 0.2 would be weak, 0.2-0.5 would be moderate, and above 0.5 would be high.



### Lack of Trust in Leadership

"Leadership" in this context indicates the THA Directors, Executive Director, and Board of Commissioners. It has been reported among staff, that there has been a profound lack of trust in the Tacoma Housing Authority (THA) Leadership. The perception of being untrustworthy is reinforced by leadership's inability to foster transparency and inclusion in organizational decision-making processes. Respondents mentioned several instances of interpersonal challenges when interfacing with Leadership. Interpersonal challenges where members of THA Leadership engender fear, resistance, and harm, further reinforcing the condition of a lack of trust in leadership, emphasizing the Board of Commissioners.

It is important to note that some recurring supporting examples emerging when discussing this issue were the recent search process for the Executive Director role and the separation of past employees.

*"It starts at the top, and it's the person that does not do the work. So he takes it on. [...] And then that work spreads, right? But it's too much, to begin with. So it spreads to a program manager or supervisor who just Yes, ma'am. Yes, sir. Takes it on. And then the dysfunction just falls down the track down the line, where it's like, nobody's really ready to take this on."*

- Participant 2



### Poor Organizational Communication

Perceived lack of transparency and follow-up on messaging (top to bottom), violation of psychological contracts, lack of structure for, and perceptiveness to, feedback. Until recently, departments were "siloeed" from each other. Perceived inaction on commitments from Leadership in the areas of Diversity, Equity, and Inclusion, and generally meeting explicit staff needs across departments.

*"What I don't trust is a lot of times, at THA, there's sort of a positive message that goes out about inclusion and diversity, equity. But then what I experience is sort of feels like it's hollow."*

- Participant 3





### Perceived Fear and Exclusion

Participants mentioned favoritism, groupthink, and “in-group/out-group” mentality leading some to fear retaliation for expressing dissent, based on reported experiences (both direct and indirect) of demotion, missed promotions, and separation from the agency. Consequently, participants report a personal perception of being neglected and/or excluded by some in the workplace.

*"I think that favoritism can undermine trust and that happens, you know, happens everywhere. But it definitely happens at our agency, where people feel like certain voices are valued higher than others."*

*- Participant 5*



### Lack of Psychological or Physical Safety

Participants shared exposure to violence, both psychological and physical, and the inability to protect themselves. In the moment and following serious reportable incidents, participants shared not feeling supported by preexisting systems of support (i.e. EAP telehealth services and counseling).

Preexisting reasonable accommodations for staff are not effective in meeting individuals' varied needs; compounding this issue is the lack of resources necessary to support the completion of work tasks (perceived inability to take time off, insufficient staffing).

*"[Coworker] ended up leaving the organization because [they] said [they] literally felt like [they were] in a domestic violence relationship with the supervisor."*

*- Participant 1*

## EXECUTIVE SUMMARY | CONSULTANT RECOMMENDATIONS

We strongly recommend that the organization begin to engage all members of THA in a holistic approach to anti-oppressive learning and development for desired Diversity, Equity, Inclusion and Belonging outcomes. We also recommend that THA prioritizes the development of a community-centered, trauma-informed strategic plan for organizational change. Below are some high level recommendations. Please note that detailed recommendations are provided in the unabridged version of the report.

- Develop a comprehensive community-driven plan for change to address the emerging data of the diagnostic and dialogic activities facilitated by TLG.
- Create programs, measures, and systems of accountability to make sure that workers from diverse backgrounds feel they belong and have the opportunity to succeed as employees at THA.
- Provide employees with frequent facilitated antiracist workshops that demonstrate THA's commitment to antiracist and anti-oppressive learning and development
- Commit to the process of intentional institutional restructuring, based upon anti-racist analysis and identity with support from experts and a data-driven process.
- Audit and restructure all aspects of institutional life to ensure full participation of People of Color, including their worldview, culture, and lifestyles.
- Administer a fair and systematic approach for recruiting, evaluating, and selecting individuals for competitive service, excepted service, senior management, and professional development programs, including when assembling selection panels.
- Regular team building engagement interdepartmental and transdepartmental engagements, improve morale, better communication, disrupt siloing, improve employee relations, increase motivation, and improve mental health.
- Reduce reliance on standardized measures of success that are discriminatory and of limited value in identifying ability and predicting success.
- Prioritize improving employee mental health resources
- Leadership to conduct listening tours to deepen understanding of organizational member needs

The organizational assessment is just the first step in planning for change. Continuous and frequent assessment of the organization is necessary to understand the organizational challenges and dynamic complexities of THA.





# 2022 PRELIMINARY ORGANIZATIONAL ASSESSMENT SUMMARY REPORT FOR THE TACOMA HOUSING AUTHORITY (UNABRIDGED VERSION)

Prepared by

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AN ORGANIZATIONAL DEVELOPMENT CONSULTING FIRM

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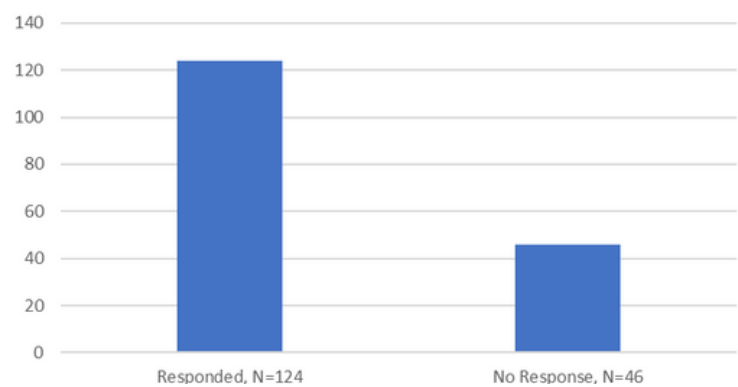


# PARTICIPANT DEMOGRAPHICS

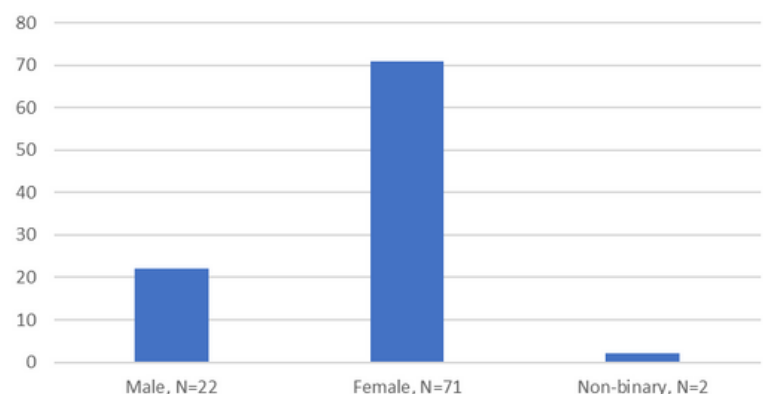
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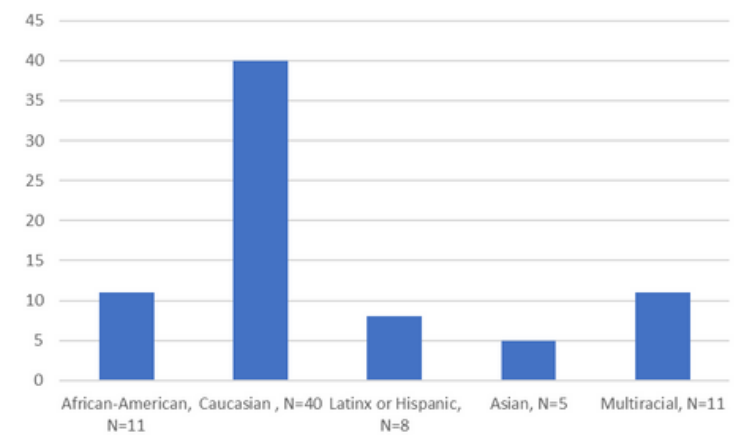
Response Rate



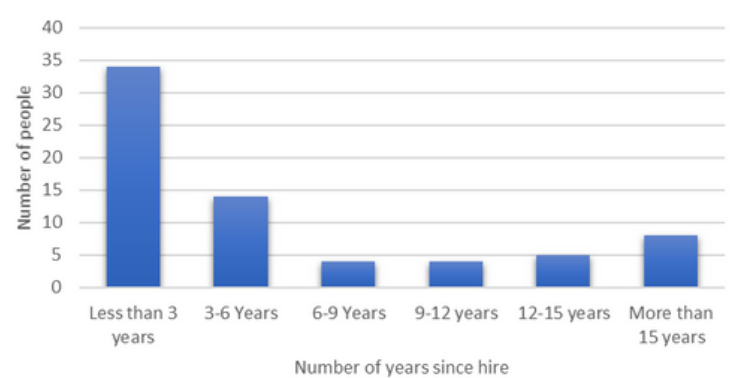
Gender



Ethnicity



Tenure



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## Methodology

This organizational assessment approach was multi-methodological. This means our research included the use of more than one method of data collection. Further, this process is defined as a type of research that combines qualitative (Phenomenological Analysis) and quantitative (correlation analysis) methods into a single study, which allows us to produce rich data, informing our understanding of the organizational needs of THA in its current state.

Our process was also multidimensional, measuring several dimensions: social bias and attitudes, psychological safety, and traumatization, among other constructs of organizational life, with emphasis on diversity, equity, inclusion, and belongingness (DEIB). The contributions of THA's internal stakeholders were critical to this process, and we took the responsibility of amplifying their voices seriously.

## The Organizational Assessment Survey Process

Based on preliminary touchpoints with THA, the assessment team determined several constructs to be measured to assist the facilitation team in better helping employees from THA. Specifically, the survey measured Systematic Evaluation, Resistance to Change, Psychological Safety, Social Attitudes & Bias, Trust, Traumatization, Hope/Optimism, and Locus of Control.

## The Structured Diagnostic Interview Process

Diagnostic interviews, as an instrument, are a process designed to allow individual participants to expand on the information shared in their survey responses, through a highly structured sequence of open-ended questions. Through this phenomenological approach, assessors collect reports of critical incidents and personal experiences, which will inform a finalized narrative. Critical incidents, in this context, can be defined as events which best exemplify the concept under observation or individuals' performance. An initial set of interviews (n=8) was conducted to create the preliminary narrative; participants were encouraged to volunteer their experiences and randomly sampled (n=21) from a client-provided list of internal stakeholders. Further, ongoing interviews will be conducted throughout the length of the engagement.



### Overview of Organizational Assessment Dimensions

Several dimensions (subject matter that one wishes to measure using survey questions) were identified based on both existing literature and archival data from Tacoma Housing Authority on which areas of focus should be prioritized; specific dimension definitions and details are provided below. *Note: small group size could make interpretation misleading, and hence we have excluded some groups (i.e., Asian & Multiracial).*

**Systematic Evaluation** | Discrimination can systemically manifest in organizations as a result of formal and informal policies, decision-making practices, lines of communication, and other organization-wide structures that permeate from the top throughout the rest of the organization from organizational leadership teams, groups, and at individual levels; Internal and external stakeholders that are individuals of oppressed identities can be intentionally or unintentionally impacted by decisions made across all levels of the organization.

The systematic evaluation aims to understand the degree to which, if any, oppressed identities are being systematically impacted through investigating employee perspectives across all areas of the scope of an organization.

**Resistance to Change** | A major roadblock to attaining effective change management is employee resistance. Resistance to change is the extent to which an individual or organization is unwilling to adjust or adapt to a new or altered situation. Resistance to change comprises affective, cognitive, and behavioral components and can be defined as a "tridimensional (negative) attitude towards change".

**Social Bias and Attitudes** | Social bias is inherently a flawed chain of thought that entails being in favor of or against specific groups of people based on their social identities, such as gender, race, or age to name a few. These biases that result in unfair judgments and assumptions can be based on systemic prejudices and stereotypes can be a product of individuals acting on their social assumptions, or biases. Hatred or discomfort are some manifestations experienced by individuals who possess negative feelings and attitudes towards certain groups of people due to their membership in a particular social group.



**Psychological Safety** | An individuals' perceptions of the consequences of interpersonal risks in their work environment. The higher the individuals' psychological safety, the lesser they have to fear the negative consequences of their image, status, and career when they show and employ themselves freely.

**Trust of Coworkers/Supervisors** | "The belief that something/someone is true or correct, or that you can rely on it" (Duffy and Lilly, 2013). In the current business world, leaders play a major role in the outcomes of organizations. These can be turnover, environmental responsibilities, wellbeing, social image, and market elements.

**Traumatization** | The collective symptomatology of previous trauma that exists within an organization as a result of previously unresolved issues or points of conflict that resonate across the organization at a systemic, group, and individual level. Additionally, it is encompassed by the individual, collective, and organizational subjective perceptions of unresolved issues or conflict that still permeate and impact ongoing work, relationships, and well-being across each level.

**Hope/Optimism** | Hope in this context can be described as a positive motivational state that contributes to leaders and followers expending the requisite energy necessary to pursue and attain organizational goals.

**Locus of control** | Locus of control (perception of power within oneself-versus being solely by environment) is the degree to which people believe that they, as opposed to external forces, have control over the outcome of events in their lives.

### Overview of Diagnostic Interviews

Stakeholders were invited to volunteer for structured, 30-minute one-on-one interviews with assessors from The Lindsay Group. Further participants were randomly selected and requested from a staff list provided by THA; respondents included leadership members, middle-level managers, and client-facing individual contributors. Questions touched on themes of psychological safety, trust, interpersonal relations, collaboration, stress and problem-solving in the workplace, and the presence of trauma in the workplace; ultimately, the information thus collected is used to construct a cohesive narrative of THA employees' experiences through these themes.

**Interpersonal relations** | An interpersonal relationship is an association between two or more people that may range from fleeting to enduring; it is a dynamic system that changes continuously. This association may be based on inference, love, solidarity, regular business interactions, or other social commitment. Interpersonal relationships are formed in the context of social, cultural, and other influences.

**Collaboration** | The process through which two or more parties, who see different aspects of a problem or perspectives, can constructively explore their differences and search for solutions that go beyond the limitations that any single party faces (Gray, 1989). Specifically, the organizational collaboration aims to affect societal change within a given ecosystem and across its stakeholders (Pasquero, 1989).

**Stress** | Stress can be defined as a person's psychological and physiological response to the perception of a demand or a challenge (referred to as stressors in literature) – in this case, in the context of the workplace. While individual stressor tolerance levels can vary, stress responses should not be protracted over time. They can be detrimental to individuals' well-being, physical and mental health, and overall work performance.

**Problem-Solving** | The process by which individuals attempt to overcome difficulties, achieve plans that move them from a starting situation to the desired goal, or reach conclusions through higher mental functions, such as reasoning and creative thinking (American Psychological Association, 2021).

### Process of Quantitative Analysis | Correlational Analysis

We used correlation analysis procedures to test/assess the relationships between quantitative variables & categorical variables. This process allowed us to measure how variables are related. Correlation is a statistical measure that expresses the extent to which two variables are linearly related (meaning they change together at a constant rate). It's a common tool for describing simple relationships without making a statement about cause and effect.

***For greater context, we outlined a guide below to support with the reading of the reported findings:***

In this report, the sample correlation coefficient,  $r$ , quantifies the strength of the relationship and correlations are tested for statistical significance.

We described correlations with a unit-free measure called the correlation coefficient which ranges from  $-1$  to  $+1$  and is denoted by  $r$ . Statistical significance is indicated with a  $p$ -value. Therefore, correlations are typically written with two key numbers:  $r =$  and  $p =$ . Bear in mind that with the analysis of this assessment and reported findings,  $p$ -values are not reported because all values reported are measurably statistically significant at  $p < 0.05$  level.

### Points to understand as you review the reported findings:

1. The closer  $r$  is to zero, the weaker the linear relationship.
2. Positive  $r$  values indicate a positive correlation, where the values of both variables tend to increase/decrease together.
3. Negative  $r$  values indicate a negative correlation, where the values of one variable tend to increase when the values of the other variable decrease.
4. The  $p$ -value gives us evidence that we can meaningfully conclude that the population correlation coefficient is likely different from zero, based on what we observe from the sample.

For ease of interpretation of findings, we qualify/summarize each data point of interest.

### **Process of Qualitative Analysis | Phenomenological Analysis**

A phenomenological study attempts to set aside biases and preconceived assumptions about human experiences, feelings, and responses to a particular situation. It allows the researcher to delve into the perceptions, perspectives, understandings, and feelings of those who have actually experienced or lived the phenomenon or situation of interest. Therefore, phenomenology can be defined as the direct investigation and description of phenomena as consciously experienced by people living those experiences (Krathwohl, 1998).

For this qualitative aspect of this assessment, Colazzi's (1978) phenomenology data analysis model was used. The following outlined steps informed the process for qualitative data analysis:

1. Review transcribed interviews and understand each participant's background and related experience.
2. Identify significant statements related to the phenomenon.
3. Develop meanings from each significant statement. Review research protocols to ensure original description is evident.
4. Arrange interpretive meanings into clusters, allowing themes to emerge. Seek validation, avoid repetitive themes, and identify any and all discrepancies.

The data collection process involved the audio recording and transcription of responses, written behavioral observation notes (e.g., "the participant started crying"), the subjects' documented responses (i.e., anything written), informal and formal email communications, and direct conversations. All of these are called "raw data", which is unprocessed first-hand information. The raw data was then processed through numerous coding cycles to prepare them for analysis and interpretation. This is a back-and-forth process where the more data being coded the more we can refine our "coding scheme", or how the data should be coded. As a hypothetical example, as we code more data, we realized that two separate themes might be connected through the same root cause, in which case we would refine our coding scheme and combine these two themes together into a big theme.

Through this rigorous analysis process, we eventually developed four emergent big themes, as defined in the 'Key Findings' segment of this report.

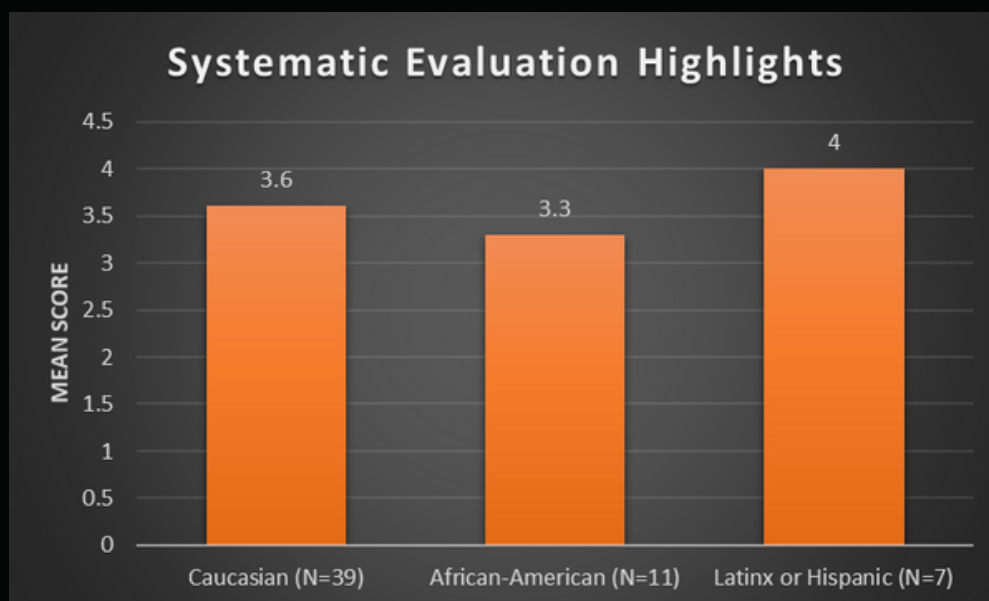
## Overview of Results of OAS

The overall results of the Organizational Assessment indicate that there are no statistically significant differences across groups<sup>\*\*</sup>. However, considering the high completion rate, simple **mean comparisons** in the ethnicity group and tenure group become meaningful. A 5-point Likert scale was utilized in the survey; it provided five possible answers to a statement or question and allowed respondents to indicate their strong agreement (5) - to strong disagreement (1) regarding the question or statement. Below are more specific analyses focusing on some constructs that we highlight as important<sup>\*\*\*</sup>.



### Systematic Evaluation (Concerns whether members are being systematically impacted)

We observed that the Caucasian group (M=3.6, n=39) reported higher systematic evaluation than the African-American group (M=3.3, n=11) but lower than the Latinx or Hispanic group (M=4.0, n=7). This suggests that the Latinx or Hispanic group views THA's system more positively than the Caucasian group and than the African-American group. A sample item is "For the most part, THA management has a clear understanding of my immediate needs and concerns at work", where the Caucasian group reported 3.5, the African-American group reported 3.1, and the Latinx or Hispanic group reported 4.2.



<sup>\*\*</sup> participant responses were grouped by gender, ethnicity, and tenure

<sup>\*\*\*</sup> A score of 1-2.9 would be a low score, 3-3.9 would be moderate, and 4-5 would be high. M=Mean score, n=Number of responses

### Overview of Results of OAS



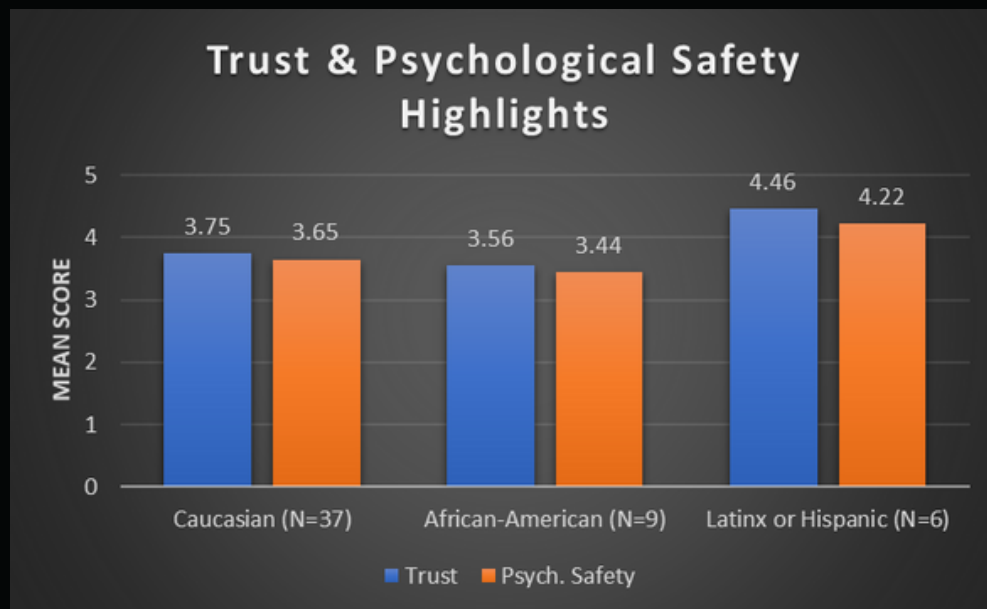
**Trust & Psychological Safety** is about whether members feel safe and trustful.

We observed that the Latinx or Hispanic group ( $M=4.46$ ,  $n=6$ ) reported higher Trust than the Caucasian group ( $M=3.75$ ,  $n=37$ ) and the African-American group ( $M=3.56$ ,  $n=9$ ), as well as Psychological Safety where the Latinx or Hispanic group ( $4.22$ ) reported higher Trust than the Caucasian group ( $3.65$ ) and the African-American group ( $3.44$ ). These indicate that the Latinx or Hispanic group perceived the strongest support from their supervisors/colleagues and perceived higher levels of psychological safety and trust.



**Traumatization** is about the extent to which members have experienced trauma.

All groups reported Trauma in the neutral range ( $3.0 \sim 3.2$ ). This suggests that employees from THA are generally moving away from previous events that could result in trauma. It is essential to remember that traumatization is not always reflected in organization-wide surveys, as these experiences frequently occur to only a small subset of stakeholders. It is recommended to rely more on structured interview results to understand employee traumatization better.



\*\* participant responses were grouped by gender, ethnicity, and tenure

\*\*\* A score of 1-2.9 would be a low score, 3-3.9 would be moderate, and 4-5 would be high. M=Mean score, n=Number of responses





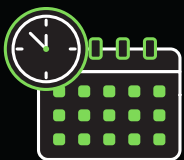
**Correlation: Social Attitudes & Bias** is about the extent to which members perceive attitudes and biases influence organizational behavior.

A correlation between Social Attitudes and Bias was observed concerning its relationship to the variable, Resistance to Change ( $r=-0.24$ ). This correlation suggests that the more biases employees perceive in the workplace, the more they would welcome change. This finding further signifies the urgency and desire for change confirms the importance of THA's commitment to becoming an anti-oppressive organization and advancing diversity, equity, inclusion, and belonging across the organization's ecology.



**Correlation: Systematic Evaluation Correlations** is about whether members are being adversely impacted by systemic or organizational level decision-making.

We observed a correlation between Systematic Evaluation and Psychological Safety ( $r=0.54$ ), Trust ( $r=0.61$ ), Trauma ( $r=-0.3$ ), and Hope ( $r=0.3$ ). This is expected, as those who are not systematically oppressed should feel more psychologically safe, perceive more trust, less trauma, and hold more optimism. This finding further confirmed that it is important for THA to consider systematic changes to better help employees combatting potential trauma.



**Correlation: Tenure Correlations** is about understanding employee perceptions of THA over their course career.

We also observed a correlation between Tenure and Systematic Evaluation ( $r=-0.3$ ) and Trust ( $r=-0.3$ ). This is a signal that demands action, as this is indicating that, as employees stay longer with THA, they evaluate the THA system more negatively and trust their supervisor/colleagues less. Our facilitation team is aware of this. In fact, addressing this as well as other aforementioned concerns is well within the scope of the partnership between The Lindsay Group and THA.

\*\*\* all correlations presented here are statistically significant

In addition, an absolute  $r$  value below 0.2 would be weak, 0.2-0.5 would be moderate, and above 0.5 would be high.



### Lack of Trust in Leadership

"Leadership" in this context indicates the THA Directors, Executive Director, and Board of Commissioners. It has been reported among staff, that there has been a profound lack of trust in the Tacoma Housing Authority (THA) Leadership. The perception of being untrustworthy is reinforced by leadership's inability to foster transparency and inclusion in organizational decision-making processes. Respondents mentioned several instances of interpersonal challenges when interfacing with Leadership. Interpersonal challenges where members of THA Leadership engender fear, resistance, and harm, further reinforcing the condition of a lack of trust in leadership, emphasizing the Board of Commissioners.

It is important to note that some recurring supporting examples emerging when discussing this issue were the recent search process for the Executive Director role and the separation of past employees.

*"It starts at the top, and it's the person that does not do the work. So he takes it on. [...] And then that work spreads, right? But it's too much, to begin with. So it spreads to a program manager or supervisor who just Yes, ma'am. Yes, sir. Takes it on. And then the dysfunction just falls down the track down the line, where it's like, nobody's really ready to take this on."*

- Participant 2



### Poor Organizational Communication

Perceived lack of transparency and follow-up on messaging (top to bottom), violation of psychological contracts, lack of structure for, and perceptiveness to, feedback. Until recently, departments were "siloe" from each other. Perceived inaction on commitments from Leadership in the areas of Diversity, Equity, and Inclusion, and generally meeting explicit staff needs across departments.

*"What I don't trust is a lot of times, at THA, there's sort of a positive message that goes out about inclusion and diversity, equity. But then what I experience is sort of feels like it's hollow."*

- Participant 3





### Perceived Fear and Exclusion

Participants mentioned favoritism, groupthink, and “in-group/out-group” mentality leading some to fear retaliation for expressing dissent, based on reported experiences (both direct and indirect) of demotion, missed promotions, and separation from the agency. Consequently, participants report a personal perception of being neglected and/or excluded by some in the workplace.

*"I think that favoritism can undermine trust and that happens, you know, happens everywhere. But it definitely happens at our agency, where people feel like certain voices are valued higher than others."*

*- Participant 5*



### Lack of Psychological or Physical Safety

Participants shared exposure to violence, both psychological and physical, and the inability to protect themselves. In the moment and following serious reportable incidents, participants shared not feeling supported by preexisting systems of support (i.e. EAP telehealth services and counseling).

Preexisting reasonable accommodations for staff are not effective in meeting individuals' varied needs; compounding this issue is the lack of resources necessary to support the completion of work tasks (perceived inability to take time off, insufficient staffing).

*"[Coworker] ended up leaving the organization because [they] said [they] literally felt like [they were] in a domestic violence relationship with the supervisor."*

*- Participant 1*

Thematic Analysis of Qualitative Data

For context, thematic analysis is an appropriate analysis method for seeking to understand experiences, thoughts, or behaviors across a data set. Themes are actively constructed patterns (or meanings) derived from a data set that answer a research question, as opposed to mere summaries or categorizations of codes; in the diagnostic interview process, our objective was to understand the interplay between individual participants, group, and systems levels. Themes were generated inductively.

The process of inquiry and imagination of all possible outcomes of the how, why, and what the participants experienced and shared through four themes represented imaginative variation. Imaginative variation is operationalized as a point in the analysis process intended to explicate the structures of experience more distinctively and is best described as a mental experiment. Features of the experience are imaginatively altered to view the phenomenon under investigation.

Each emerging theme and eight diagnostic interviews' data were evaluated within this study. The table below provides a snapshot of the results of the four themes outlining frequency among respondents.



\*\*\*Theme frequency as reported by diagnostic interview participants



# CONSULTANT CONCLUSIONS + RECOMMENDATIONS

As previously reported, the overall results of various constructs being measured indicate that there are no statistically significant differences across groups, and no severe/extreme scores were observed at the group level. However, considering the concerning nature of responses from participants through diagnostic interviews and surveys coupled with the high completion rate and simple mean comparisons. There is a profound urgency and desire for strategic action for change for THA.

To this end, we are pleased to present our recommendations for an improved organizational system at THA. The activity of an organizational assessment is just the first step in planning for change and certainly does not at all suggest that the effort of evaluating the ecosystem of THA should end with this report. Continuous and frequent assessment of the organization is necessary to understand the dynamic complexities of THA and the forces, both internally and externally, that influence the ways in which the organization behaves.

The recommendations presented here are informed by the outcomes of the organizational assessment diagnostic process and structured facilitated activities designed to elicit employee information about the current state of THA and their desired outcomes for change. Please note that the recommendations are based on an early understanding of the organization, which means they are at a somewhat high level. They will of course, be expanded as we engage in the process.

The objective of the recommendations presented here is intended to support the strategic advancement of THA's organizational change initiatives emphasizing an anti-oppressive and trauma-informed lens, promoting a sense of belonging, inclusion, and psychological safety.

The recommendations provided are responsive to identified needs at the following organizational levels:

1. **Organizational & Systems** | An organizational system is how an organization is set up. That structure defines each division of the organization, the hierarchy of direct reports, and how communication flows throughout the organization as well as between the organization and the surrounding environment and stakeholders.
2. **Group & Individual** | A group is defined as two or more individuals who (a) engage in interactions (b) depend on each other and (c) share an understanding of concepts and objectives of their interactions. Individuals influence groups they are a member of with their perspectives, knowledge, attitudes, and behaviors.

# RECOMMENDATIONS

- Develop a comprehensive community-driven plan for change to address the emerging data of the diagnostic and dialogic activities facilitated by TLG. With the following objectives:
  - Members across all identity groups are full participants in decisions that shape the institution and include diverse cultures, lifestyles, and interests.
  - Create and implement a communications strategy that further elevates antiracism diversity and inclusion as a key strategic priority and reinforces leadership commitment.
  - Create accountability metrics for developing talent.
  - Adopt an effective antiracist and anti-oppressive mission statement that clearly and concisely declares its commitment to acknowledge and combat all forms of systemic, structural, and individual racism and oppression within its organization.
  - Use employee feedback, including employee/culture data, to create, update, and implement action plans to improve organizational culture; encourage leadership approaches that support employee engagement and belonging, and address specific employee concerns.
  - Create programs, measures, and systems of accountability to make sure that workers from diverse backgrounds feel they belong and have the opportunity to succeed as employees
  - Use quantitative and qualitative data to evaluate programs and processes and identify barriers that may deter inclusivity and opportunity for all.
- Create programs, measures, and systems of accountability to make sure that workers from diverse backgrounds feel they belong and have the opportunity to succeed as employees at THA.

# RECOMMENDATIONS

- We recommend that THA demonstrate its commitment to antiracist and anti-oppressive learning and development by providing employees with frequent facilitated antiracist workshops that focus on the following learning domains:
  - Focuses on systems of racism and oppression impacting marginalized populations and individual contributions to these systems.
  - Explore the impact of systems of oppression. Identify how personal power and privilege may contribute to inequitable systems and discuss barriers and solutions to shifting power dynamics.
  - Micro-aggressions (racial, queer, trans, and varied abilities)
  - Implicit Bias and Cross-racial supervision.
  - Anti-racism and anti-oppression.
  - Difficult Dialogue Training: age, race, gender, ethnicity, religion, sexual orientation, gender expression, sexual identity, disabilities, language, cultural background, family or immigration status or other social identity issues.
- Commit to the process of intentional institutional restructuring, based upon anti-racist analysis and identity with support from experts and a data-driven process.
- Audit and restructure all aspects of institutional life to ensure full participation of People of Color, including their worldview, culture, and lifestyles.
- Implements structures, policies, and practices with inclusive decision-making and other forms of power-sharing on all levels of the institution's life and work.
- Commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities.
- Continuous evaluation of organizational policy and corresponding materials. Policy and document evaluation should apply a critical antiracist/anti-oppressive evaluation method to examine the content, implementation, and impact of the potential harm of a policy.

# RECOMMENDATIONS

- Explore the social construct of race; Recognize and examine our privilege in society based on the intersectionality of our identities, and Examine the impact of systemic racism.
- Administer a fair and systematic approach for recruiting, evaluating, and selecting individuals for competitive service, excepted service, senior management, and professional development programs, including when assembling selection panels.
- Regular team building engagement interdepartmental and transdepartmental engagements, improve morale, better communication, disrupt siloing, improve employee relations, increase motivation, and improve mental health.
- Reduce reliance on standardized measures of success that are discriminatory and of limited value in identifying ability and predicting success.
- Ensure the THA work environment and activities are welcoming, accessible, and inclusive of individuals with disabilities; support hiring and promotion of individuals with disabilities, including special hiring authorities.
- Identify opportunities to embed antiracist diversity and inclusion priorities into public-facing aspects of the THA's work.
- Prioritize improving employee mental health resources to include:
  - Create feedback loops with employees, like surveys, feedback channels, and input sessions to proactively identify signs of resistance.
  - Facilitate the launch of employee resource groups this quarter.
  - Adopt a restorative racial healing program designed to build, maintain, and, when necessary, repair relationships among all THA community organizational members.
  - Commission a pay equity audit ahead of this spring's compensation cycle.
- Leadership to conduct listening tours to deepen understanding of organizational member needs.



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# APPENDIX A: CORRELATIONS

Pearson's Correlations

| Variable        |             | Tenure_Year | Syst Eval X | ResChange X | PsychSafe X | SocialBias X | Trust X   | Trauma X | Opt X | Locus X |
|-----------------|-------------|-------------|-------------|-------------|-------------|--------------|-----------|----------|-------|---------|
| 1. Tenure_Year  | Pearson's r | —           |             |             |             |              |           |          |       |         |
|                 | p-value     | —           |             |             |             |              |           |          |       |         |
| 2. Syst Eval X  | Pearson's r | -0.334**    | —           |             |             |              |           |          |       |         |
|                 | p-value     | 0.005       | —           |             |             |              |           |          |       |         |
| 3. ResChange X  | Pearson's r | 0.066       | -0.164      | —           |             |              |           |          |       |         |
|                 | p-value     | 0.595       | 0.115       | —           |             |              |           |          |       |         |
| 4. PsychSafe X  | Pearson's r | -0.150      | 0.537***    | -0.210*     | —           |              |           |          |       |         |
|                 | p-value     | 0.224       | < .001      | 0.042       | —           |              |           |          |       |         |
| 5. SocialBias X | Pearson's r | -0.182      | 0.112       | -0.240*     | 0.073       | —            |           |          |       |         |
|                 | p-value     | 0.143       | 0.285       | 0.021       | 0.490       | —            |           |          |       |         |
| 6. Trust X      | Pearson's r | -0.291*     | 0.607***    | -0.200      | 0.778***    | 0.095        | —         |          |       |         |
|                 | p-value     | 0.020       | < .001      | 0.062       | < .001      | 0.367        | —         |          |       |         |
| 7. Trauma X     | Pearson's r | -0.003      | -0.295**    | 0.061       | -0.572***   | 0.039        | -0.383*** | —        |       |         |
|                 | p-value     | 0.983       | 0.005       | 0.571       | < .001      | 0.716        | < .001    | —        |       |         |
| 8. Opt X        | Pearson's r | -0.144      | 0.305**     | -0.279**    | 0.572***    | 0.217*       | 0.554***  | -0.250*  | —     |         |
|                 | p-value     | 0.259       | 0.004       | 0.009       | < .001      | 0.042        | < .001    | 0.019    | —     |         |
| 9. Locus X      | Pearson's r | 0.011       | -0.081      | -0.169      | -0.022      | -0.137       | -0.027    | -0.077   | 0.039 | —       |
|                 | p-value     | 0.929       | 0.456       | 0.120       | 0.841       | 0.207        | 0.801     | 0.478    | 0.718 | —       |

\* p < .05, \*\* p < .01, \*\*\* p < .001

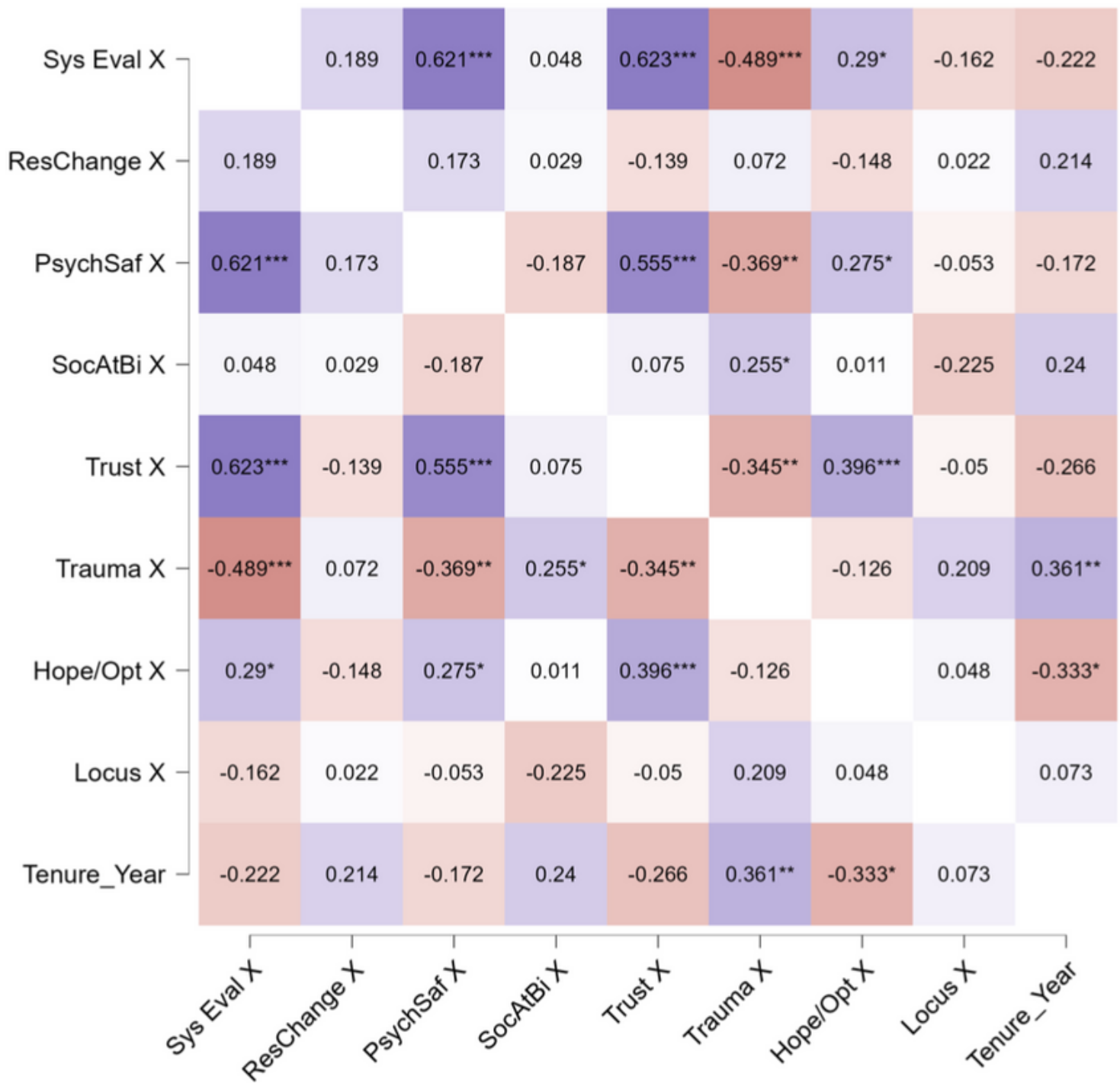




# APPENDIX B: CORRELATION | PEARSON'S R HEATMAP

**Pearson's r heatmap**

\*\*\*Correlation heatmap is graphical representation of correlation matrix representing correlation between different variables.



# APPENDIX C: OVERVIEW OF DESCRIPTIVE STATISTICS

\*\*\*Descriptive statistics are used to describe the basic features of the data in a study. They provide simple summaries about the sample and the measures.

## Overall Demographic Descriptive Statistics ▼

### Descriptive Statistics

|         | Gender | Ethnicity | Sexuality | Tenure_Year_Bucket |
|---------|--------|-----------|-----------|--------------------|
| Valid   | 101    | 86        | 81        | 69                 |
| Missing | 18     | 33        | 38        | 50                 |
| Mean    |        |           |           |                    |

Note. Not all values are available for *Nominal Text* variables

## Frequency Tables ▼

### Frequencies for Gender ▼

| Gender  | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| Female  | 73        | 61.345  | 72.277        | 72.277             |
| Male    | 24        | 20.168  | 23.762        | 96.040             |
| Other   | 4         | 3.361   | 3.960         | 100.000            |
| Missing | 18        | 15.126  |               |                    |
| Total   | 119       | 100.000 |               |                    |

### Frequencies for Ethnicity

| Ethnicity          | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------------|-----------|---------|---------------|--------------------|
| African-American   | 11        | 9.244   | 12.791        | 12.791             |
| Asian              | 5         | 4.202   | 5.814         | 18.605             |
| Caucasian          | 40        | 33.613  | 46.512        | 65.116             |
| Latinx or Hispanic | 8         | 6.723   | 9.302         | 74.419             |
| Other              | 22        | 18.487  | 25.581        | 100.000            |
| Missing            | 33        | 27.731  |               |                    |
| Total              | 119       | 100.000 |               |                    |

# APPENDIX C: OVERVIEW OF DESCRIPTIVE STATISTICS CONT.

## Frequencies for Sexuality ▼

| Sexuality                 | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------------------------|-----------|---------|---------------|--------------------|
| Bisexual                  | 6         | 5.042   | 7.407         | 7.407              |
| Heterosexual/Straight     | 59        | 49.580  | 72.840        | 80.247             |
| Homosexual/Gay or lesbian | 8         | 6.723   | 9.877         | 90.123             |
| Prefer Not to Answer      | 8         | 6.723   | 9.877         | 100.000            |
| Missing                   | 38        | 31.933  |               |                    |
| Total                     | 119       | 100.000 |               |                    |

## Frequencies for Tenure\_Year\_Bucket

| Tenure_Year_Bucket | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------------|-----------|---------|---------------|--------------------|
| 12-15 years        | 5         | 4.202   | 7.246         | 7.246              |
| 3-6 years          | 14        | 11.765  | 20.290        | 27.536             |
| 6-9 years          | 4         | 3.361   | 5.797         | 33.333             |
| 9-12 years         | 4         | 3.361   | 5.797         | 39.130             |
| Less than 3 years  | 34        | 28.571  | 49.275        | 88.406             |
| More than 15 years | 8         | 6.723   | 11.594        | 100.000            |
| Missing            | 50        | 42.017  |               |                    |
| Total              | 119       | 100.000 |               |                    |

## Overall Descriptive Statistics

### Descriptive Statistics

|                | Syst Eval X | ResChange X | PsychSafe X | SocialBias X | Trust X | Trauma X | Opt X | Locus X |
|----------------|-------------|-------------|-------------|--------------|---------|----------|-------|---------|
| Valid          | 97          | 94          | 94          | 96           | 92      | 91       | 88    | 87      |
| Missing        | 22          | 25          | 25          | 23           | 27      | 28       | 31    | 32      |
| Mean           | 3.479       | 2.686       | 3.636       | 3.479        | 3.745   | 3.086    | 4.241 | 3.467   |
| Std. Deviation | 0.692       | 0.492       | 0.763       | 0.498        | 0.583   | 0.659    | 0.638 | 0.456   |
| Minimum        | 1.750       | 1.400       | 1.500       | 2.270        | 1.770   | 1.000    | 2.200 | 2.000   |
| Maximum        | 5.000       | 4.000       | 5.000       | 5.000        | 4.770   | 4.330    | 5.000 | 4.330   |

**Tacoma Housing Authority Board Retreat Agenda**  
***“On the Road to Becoming an Anti-Oppressive Organization”***

**April 2022**

**Facilitated by The Lindsay Group Co.**

**Purpose:** The board retreat is designed to engage the board in regular self-assessment and to facilitate/stimulate the growth of the board. The retreat will also provide leadership development to all commissioners and opportunities for identifying gaps and working to gain alignment across the group.

**Session 1 - 120 minutes**

**Open Space: Welcomes, Appreciations, and Introductions**

- Introductions
- Overview of Session Agenda
- Setting Intentions
  - What do you hope to achieve with the board retreat?

**State of the Tacoma Housing Authority**

- **ED to provide a very brief overview of THA in its current state.**
  - What makes us good? What makes us great?
  - THA ED's Vision for Change.
    - How can the board support the advancement of this vision?
  - Discussion and Reflection

**Relationship Building**

- **Deeping Connection Exercises**
  - **Activity 1: Leaders I Admire**
    - **Activity Description:** Participants will get together to discuss their favorite leaders and highlight the reasons behind the same.
    - **Objective:** This session aims to improve team cohesion and to help the commissioners to understand what qualities, attributes, and desirable leadership characteristics.
    - **Group Reflections:** Participants will be prompted to reflect on their experiences.
  - **Activity 2: I Am...But I Am Not**
    - **Activity Description:** Participants will be engaged in a LISTENING exercise designed to provide an opportunity for commissioners to name and own their identities and confront stereotypes they face.
    - **Objective:** Facilitators will hold space to encourage different elements that allow people to bring their whole selves to the space AND celebrate differences.
    - **Group Reflections:** Participants will be prompted to reflect on their experiences.
- **Values Alignment**
  - Participants will consider the following questions to understand level of value alignment:
    - What are our individual core values?
    - What are our collective values?
    - How are we aligned in our personal and professional core values?

- How do our individual and collective values map back to THA values?

#### **Close Space: Offering of Gratitude and Affirmations**

- Reflections: Open Discussion

### **Session 2- 120 minutes**

#### **Welcome Back**

- **Grounding**
  - 1-minute deep breathing exercise.
- **Recap of Session 1**
  - The facilitator will ask participants to share 1 or 2 highlights from Session 1 of their experience.
- **Overview of Retreat Activities**
  - Facilitator to provide an overview of the retreat agenda and schedule of activities.
- **Setting Intentions**
  - The facilitator will prompt participants to state their intentions and desired outcomes of the session.

#### **Understanding Our Needs at the Board Level**

- **Activity 1: Board Self-Assessment**
  - **Activity Description:** The facilitator will present a short hypothetical scenario for the board to strategically and collaboratively respond to.
  - **Objective:** This activity will evaluate the collaborative problem-solving and decision-making faculties of the board.
  - **Group Reflections:** Participants will be prompted to reflect on their experiences.
- **Activity 2: Board Self-Assessment**
  - **Activity Description:** The participants will be asked to stitch up a coherent story from a set of sequential pictures that are provided at random. They must determine the correct sequence of the story while being unable to see the pictures that the other participants possess.
  - **Objective:** This team assessment will allow the group to evaluate its, communication skills, and tolerance.
  - **Group Reflections:** Participants will be prompted to reflect on their experiences.

#### **Identifying Areas for Growth**

- **Exploring Individual and Group Level Needs Exercise**
  - **Activity Description:** Participants will engage in an exercise of identifying and naming their individual needs across the domains of their board-level responsibilities. Participants will then move to engage in a similar exercise for identifying group-level needs.
  - **Objective:** These exercises will allow participants to identify areas for growth and needs for support, at both the individual and group level. The emergent themes from this exercise will then be used to inform action steps for growth.

- **Group Reflections:** Participants will be prompted to reflect on their experiences.

### **Action Steps for Growth**

- **Planning for Growth**

- **Activity Description:** The participants will develop a short-term (6 month) action plan outlining a set of actions intended to address the identified needs and support the growth of the board of commissioners.
- **Objective:** The participants will collaboratively develop a plan complete with measurable objectives, goals, and tactics responsive to the identified needs of the group.
- **Group Reflections:** Participants make commitments to follow through with the plan.

### **Close Space: Offering of Gratitude and Affirmations**

- Reflections: Open Discussion



**Tacoma  
Housing  
Authority**

**Executive Director**  
April Black

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

April 4, 2022

The Honorable Maria Cantwell  
United States Senator  
511 Hart Senate Office Building  
Washington, DC 20510

Dear Senator Cantwell:

I am writing this letter in support of 2023 Community Projects Funding for Tacoma Community College's (TCC) proposed "Student Housing Center" project.

Funding for TCC's proposed project would address well-documented needs in the Tacoma and surrounding area for both increased higher education attainment and homelessness prevention.

TCC's proposal is an innovative approach to educational attainment and homelessness that understands how these needs are intertwined in their root causes and therefore how they can both be addressed when those root causes are treated as one and the same. Therefore, when a student seeking to better his/her life through higher education makes the fateful and not uncommon decision to drop out of college so they can stay in their home, the most direct way to keep them in school is to provide residential housing that is safe, affordable, and on-campus so they can focus on their studies and obtain their educational goals.

TCC's proposed Student Housing Center project does just that: it will increase equitable outcomes for students seeking a higher education but who also face the insurmountable cost of housing in the Tacoma area to do so. Left unaddressed, these outcomes will continue to have a disproportionate negative impact on racial minorities and lower-income student populations who already struggle to reach their educational and employment goals due to other systemic inequities.

It is with this that I enthusiastically support this proposal and urge the review committee to give it their full consideration among what are surely many other worthy endeavors.

Sincerely,

*April Black*

April Black  
Executive Director



**Tacoma  
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Executive Director





**Tacoma  
Housing  
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**Executive Director**  
April Black

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

April 4, 2022

United State Representative Derek Kilmer  
2059 Rayburn House Office Bldg.  
Washington, DC 20515

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*April Black*

April Black  
Executive Director



May 22, 2021

Faaluaina Pritchard, Executive Director  
Asia Pacific Cultural, Center  
4851 South Tacoma Way  
Tacoma, WA, 98409

Re: Letter of Support for Asia Pacific Cultural Center

Dear Ms. Pritchard:

I understand that the Asia Pacific Cultural Center (APCC) is seeking a Congressionally Directed allocation for its exciting plan to renovate and expand the South Park Community Center for APCC's programs. I write to express the Tacoma Housing Authority's strong support for this proposal. The project would be a very good investment of public funds for many reasons. Here are three of them.

- The APCC is an essential and effective voice and asset for the region's Asian and Pacific Islander communities. It provides space to celebrate and showcase these varied cultures. It gives people of those cultures a safe place to nurture their own community cohesion. This is especially important as those communities continue to grow.
- The APCC has outgrown the building and needs more space for its ambitious and exciting expansion plans.
- The APCC is well positioned to make a very good use of this investment. It is dug deeply into the communities it serves. It has the extensive partnerships - locally and internationally - that its work needs. It has the organizational capacity and structures and leadership to do this work very well.

The Tacoma Housing Authority is pleased to be one of APCC's many partners.

Sincerely,

April Black  
Executive Director



**Tacoma  
Housing  
Authority**

**Executive Director**  
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**Board of Commissioners**  
Stanley Rumbaugh, Chair | Shennetta Smith, Vice Chair  
Dr. Minh-Anh Hodge | Derek Young | Pastor Michael Purter

March 31, 2022

United States Senator Patty Murray  
154 Russell Senate Office Building  
Washington, DC 20510

Dear Senator Murray:

Please accept this letter of recommendation for the Foundation for Tacoma Students and the Graduate Tacoma community-wide to pilot, learn, and scale a **Shared Childcare Services Model** in Tacoma/Pierce County. What we've seen over the past 24 months is a decline in women in our workforce; a decline of high-quality childcare services being offered, especially for our historically underserved populations; and a decline in the overall business of childcare throughout Tacoma/Pierce due to the lack of targeted and intentional resources necessary to support the field of childcare.

The Tacoma Housing Authority (THA) is excited to be a core partner in this project. THA serves over 10,000 individuals in its housing programs. Many of those people are children. High quality childcare is key for THA and Tacoma's children and their families.

I believe strongly that an investment in this locally-based model will yield an important proof of concept to consider as we work toward building an early learning system for Washington state. Further, I have the utmost confidence in the Foundation for Tacoma Students to deliver on an innovative strategy that can ensure children between the ages of 0-5 has access to the necessary resources to enter kindergarten ready to learn.

This project will achieve transformative results in the community. We value the intention and motivation of the project to substantially rebuild and fortify our childcare landscape and, as a result, our communities.

Sincerely,

April Black  
Executive Director





**Tacoma  
Housing  
Authority**

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Executive Director



Tacoma Housing Authority

**SEATTLE**  
CREDIT UNION

## SEATTLE CREDIT UNION ANNOUNCES UPCOMING EXPANSION TO PIERCE COUNTY

***SCU partners with the Tacoma Housing Authority and the Salishan Association to open a financial hub at the Salishan Family Investment Center***

**TACOMA, WA – April 13, 2022—** [Seattle Credit Union](#) is excited to announce an expansion into Tacoma in the summer of 2022.

The credit union's mission is to provide financial support and opportunities for communities that are underserved and have been systemically discriminated against. Recognizing a need for financial services outside of King and Snohomish counties, Seattle Credit Union (SCU) is expanding south to serve the Salishan community of Tacoma.

SCU will occupy a space at [The Salishan Family Investment Center](#), located at 1720 E 44<sup>th</sup> St, Tacoma, WA, 98404, in a community center that serves East Tacoma. The Salishan Association and [Tacoma Housing Authority](#), owners of this building, welcomes Seattle Credit Union as a financial partner that could meet the needs of residents in the area.

*"We are excited to welcome Seattle Credit Union to the Salishan neighborhood," says [Salishan Association](#) Board President Frankie Johnson. "We believe they will be a great partner to the Tacoma Housing Authority and the Salishan Association by providing services that meet the needs of our community."*

Seattle Credit Union's physical presence in the building will include a hub (similar to a branch office) with regular banking hours and a 24-hour ATM. This location will be staffed by employees who can open accounts, answer questions and provide financial counseling to community members. Seattle Credit Union is hopeful to staff this location with local members of the community. The credit union will also have a regular presence in the surrounding neighborhood and will provide support for local organizations, events and more.

*"It is so important for us to enter this community with caution knowing the history and harm that has taken place. We are eager to cultivate this partnership and ensure we are the financial institution of choice helping the residents in Salishan grow and prosper for generations to come. This is one huge step in the right direction, and it makes me super proud." Says [Jenefeness Tucker](#) the Vice President of Community Relations and Public Affairs at Seattle Credit Union.*

Serving Seattle as a statewide credit union since 1933, they are thrilled to have the opportunity to be Tacoma's partner in growth and prosperity, starting in Salishan. Additional details about an opening date for the branch will be available in the coming weeks. Check out the current opportunities at for employment and banking solutions at [www.SeattleCU.com](http://www.SeattleCU.com).

### *About Tacoma Housing Authority*

Established in 1940, Tacoma Housing Authority 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 develop equitably. THA develops and manages real estate and provides rental housing. In partnership with thousands of private landlords, it helps families pay the rent in the private rental market. It delivers supportive services to help families succeed as "tenants, parents, students, wage earners and builders of assets who can live without assistance." THA seeks to do its work in ways that help our community be an "attractive place to live, work, attend school, shop and play," and that help Tacoma be "safe, vibrant, prosperous, attractive and just." Learn more at [www.tacomahousing.net](http://www.tacomahousing.net)

### *About Seattle Credit Union*

Seattle's partner in growth and prosperity since 1933, Seattle Credit Union has long been committed to helping Seattle communities of every kind live financially prosperous lives. With nine branch locations throughout the Puget Sound, as well as a robust online banking system for those outside of Western Washington, SCU provides trusted financial advice, a breadth of products, and personalized service from a member-owned, not-for-profit organization that continuously re-invests in its members and the local community.

###

### **Media Contacts**

|  |  |
|--|--|
| <b>Nick Tolley</b><br>Tacoma Housing Authority<br>Communications Manager<br><a href="mailto:ntolley@tacomahousing.org">ntolley@tacomahousing.org</a><br>253.244.1766 | <b>Jenefeness Tucker</b><br>Seattle Credit Union<br>VP of Community Relations and Public Affairs<br><a href="mailto:Jenefeness.tucker@seattlecu.com">Jenefeness.tucker@seattlecu.com</a><br>206.962.4613 |
|--|--|



**TACOMA HOUSING AUTHORITY**

**ADMINISTRATION  
REPORTS**



# **TACOMA HOUSING AUTHORITY**

## **FINANCE**





# TACOMA HOUSING AUTHORITY

## **Motion**

Adopt a consent motion ratifying the payment of cash disbursements totaling \$6,397,941 for the month of March 2022.

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair

**TACOMA HOUSING AUTHORITY**  
**Cash Disbursements for the month of March 2022**

|  |           | Check Numbers |    |           |                                    |              |
|--|-----------|---------------|----|-----------|------------------------------------|--------------|
|  |           | From          | To | Amount    | Totals                             |              |
| A/P Checking Accounts  |           |               |    |           |                                    |              |
| Accounts Payable Checks                                      | Check #'s | 95,530        | -  | 95,624    |                                    |              |
| Accounts Payable ACHs  | ACHs      | 1,083         | -  | 1,117     |                                    |              |
| Business Support Center                                      |           |               |    | 1,078,000 | Program Support                    |              |
| Moving To Work Support Center                                |           |               |    | 366,076   |                                    |              |
| Moving To Work Buildings (used by Support Center)            |           |               |    | 32,757    |                                    |              |
| Tax Credit Program Support Center                            |           |               |    | 52,920    |                                    |              |
| Section 8 Programs   |           |               |    | 24,076    | Section 8 Operations               |              |
| KeyBank Building   |           |               |    | 416       | Properties                         |              |
| Salishan 7   |           |               |    | 23,534    |                                    |              |
| Alberta J Canada Bldg  |           |               |    | 177       |                                    |              |
| Hilltop Redevelopment - THDG                                 |           |               |    | 1,986     | THDG                               |              |
| THDG - General   |           |               |    | 543       |                                    |              |
| Saravida Building  |           |               |    | 760       | Development                        |              |
| Hillsdale Heights  |           |               |    | 475       |                                    |              |
| Bus Development Activity                                     |           |               |    | 12,025    |                                    |              |
| CS General Business Activities                               |           |               |    | 650       | Client Support                     |              |
| CSA Program - Business Activities                            |           |               |    | 278       |                                    |              |
| SAFE/TRAC  |           |               |    | 500       |                                    |              |
| Department of Commerce Funding for Crisis Residential Center |           |               |    | 68,029    |                                    |              |
| Community Services MTW Fund                                  |           |               |    | 10,012    |                                    |              |
| Education Private Grants (Gates, etc.)                       |           |               |    | 3,250     |                                    |              |
| Education-Local Gov't Grants (County, City)                  |           |               |    | 80        |                                    |              |
| AMP 6 - Scattered Sites                                      |           |               |    | 10        | Public Housing                     |              |
| THA SUBTOTAL   |           |               |    | 1,676,553 |                                    |              |
| Hillside Terrace 2 & 1500                                    |           |               |    | 4,571     | Tax Credit Projects - Reimbursable |              |
| Bay Terrace I & II & Community Facility                      |           |               |    | 10,256    |                                    |              |
| Housing Hilltop LLLP   |           |               |    | 5,871     |                                    |              |
| Alberta J Canada   |           |               |    | 285       |                                    |              |
| Arlington Youth Campus                                       |           |               |    | 3,054     |                                    |              |
| Court F (The Rise)   |           |               |    | 3,885     |                                    |              |
| Renew Tacoma Housing   |           |               |    | 27,478    |                                    |              |
| Salishan 1 - Salishan 6                                      |           |               |    | 34,785    |                                    |              |
| TAX CREDIT SUBTOTAL (Operations & Development - billable)    |           |               |    | 90,186    |                                    | 1,766,739    |
| Section 8 Checking Account (HAP Payments)                    |           |               |    |           |                                    |              |
| SRO/HCV/VASH/FUP/NED   | Check #'s | 485,437       | -  | 485,545   | 165,144                            |              |
|  | ACHs      | 16,970        | -  | 17,922    | 3,604,564                          | \$ 3,769,708 |
| Payroll & Payroll Fees - ADP                                 |           |               |    |           |                                    | \$ 861,493   |
| TOTAL DISBURSEMENTS  |           |               |    |           | \$                                 | 6,397,941    |

# TACOMA HOUSING AUTHORITY

## CASH POSITION - February 2022

| Account Name   |           | Current Balance      | Interest |
|--|-----------|----------------------|----------|
| <b>HERITAGE BANK</b>                                       |           |                      |          |
| Accounts Payable   |           | 12,471,967           | 0.27%    |
| Section 8 Checking   |           | 6,275,371            | 0.27%    |
| THA Affordable Housing Proceeds-Salishan                   |           | 1,974,741            | 0.27%    |
| THA Scattered Sites Proceeds                               |           | 5,894,970            | 0.27%    |
| FSS Escrows  |           | 255,414              | 0.27%    |
| CSA Escrows  |           | 123,530              | 0.27%    |
| Note Fund Account  |           | 103                  | 0.27%    |
| Key Bank Security Deposits                                 |           | 1,054                | 0.27%    |
| THA Investment Pool  |           | 338                  | 0.27%    |
| THDG - Tacoma Housing Development Group                    |           | 841,244              | 0.27%    |
| Salishan 7 Operations                                      |           | 1,767,689            | 0.27%    |
| Salishan 7 Security Deposit                                |           | 30,795               | 0.27%    |
| Salishan 7 Replacement Reserve                             |           | 502,650              | 0.27%    |
| Salishan 7 Operating Reserve                               |           | 203,949              | 0.27%    |
| Highland Crest Operations                                  |           | 1,616,614            | 0.27%    |
| Highland Crest Replacement Reserve                         |           | 322,240              | 0.27%    |
| Highland Crest Security Deposit                            |           | 40,089               | 0.27%    |
| Outrigger Operations                                       |           | 660,762              | 0.27%    |
| Outrigger Replacement Reserve                              |           | 255,723              | 0.27%    |
| Outrigger Security Deposit                                 |           | 21,970               | 0.27%    |
| Prairie Oaks Operations                                    |           | 288,132              | 0.27%    |
| Prairie Oaks Replacement Reserve                           |           | 40,168               | 0.27%    |
| Prairie Oaks Security Deposit                              |           | 6,660                | 0.27%    |
| Payroll Account  |           | 10,458               | 0.27%    |
| <b>HOME STREET BANK</b>                                    |           |                      |          |
| James Center North Operations                              |           | 1,113,181            | 0.00%    |
| James Center North Security Deposit                        |           | 63,049               | 0.00%    |
| <b>WASHINGTON STATE</b>                                    |           |                      |          |
| Investment Pool  |           | \$ 1,526,565         | 0.11%    |
| <b>1. TOTAL THA CASH BALANCE</b>                           |           | <b>\$ 36,309,427</b> |          |
| Less:  |           |                      |          |
| <b>2. Total MTW Cash Balance</b>                           |           | <b>\$ 715,483</b>    |          |
| 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           |          |
| <b>2.1. MTW Cash Available (Lines 2-2.09)</b>              |           | <b>\$ -</b>          |          |
| <b>3. MTW Cash Held By HUD</b>                             |           | <b>\$ 10,318,981</b> |          |
| <b>4. Non MTW Cash Restrictions/Obligations</b>            |           |                      |          |
| 4.1 Non MTW Operational Restrictions                       |           |                      |          |
| 4.10 HUD Restricted - Lot and Property Sales               |           | \$ 7,869,711         |          |
| 4.101 Area 2B Sales Proceeds (Afford Hsg)                  | 1,974,741 |                      |          |
| 4.102 Scattered Sites Proceeds (Afford Hsg)                | 5,894,970 |                      |          |
| 4.20 THA Property Accounts Reserved                        |           | \$ 2,739,333         |          |
| 4.201 Security Deposit Accounts                            | 163,617   |                      |          |
| 4.202 Highland Crest Operations Reserves                   | 320,000   |                      |          |
| 4.203 Highland Crest Replacement Reserves                  | 322,240   |                      |          |
| 4.204 James Center North Operations Reserves               | 230,000   |                      |          |
| 4.205 James Center North Capital                           | 262,935   |                      |          |

# TACOMA HOUSING AUTHORITY

## CASH POSITION - February 2022

|       |  |         |               |  |
|-------|--|---------|---------------|--|
| 4.206 | Outrigger Operations Reserve                                   | 150,000 |               |  |
| 4.207 | Outrigger Replacement Reserves                                 | 255,723 |               |  |
| 4.208 | Prairie Oaks Operations Reserves                               | 77,000  |               |  |
| 4.209 | Prairie Oaks Replacement Reserves                              | 80,168  |               |  |
| 4.210 | Salishan 7 Operations Reserves                                 | 375,000 |               |  |
| 4.211 | Salishan 7 Replacement Reserves                                | 502,650 |               |  |
| 4.30  | Rental Assistance Reserves                                     |         | \$ 1,170,337  |  |
| 4.301 | Mod Rehab Operating Reserves                                   | 65,653  |               |  |
| 4.302 | VASH, FUP, NED, EHV & MAIN HAP Reserves                        | 839,858 |               |  |
| 4.303 | FSS Escrows  | 264,826 |               |  |
| 4.40  | Prepaid Grants   |         | \$ 1,960,044  |  |
| 4.401 | TPS Interlocal (CS-2017-011)                                   | 243,438 |               |  |
| 4.402 | Balmer Foundation - Education Prog (CS-2020-005)               | 396,152 |               |  |
| 4.403 | College Spark (PI-2018-005)                                    | 62,033  |               |  |
| 4.404 | GTCF Grant (PI-2019-005)                                       | 236,074 |               |  |
| 4.405 | Gates - THA Education Program (PI-2020-006)                    | 1,692   |               |  |
| 4.406 | Kresge Foundation - CHAP Program (RA-2019-009)                 | 129,412 |               |  |
| 4.407 | Ballmer Foundation - COVID Rent Assist (RA-2020-003)           | 50,000  |               |  |
| 4.408 | THDG   | 841,244 |               |  |
| 4.60  | Total - Non MTW Cash Restrictions (4.10+4.20+4.30+4.40+4.50)   |         | \$ 13,739,426 |  |
| 4.70  | Agency Contracted or Budgeted Commitments Remaining            |         | \$ -          |  |
|       |  | -       |               |  |
|       |  | -       |               |  |
| 4.99  | Total Non MTW Cash Restrictions/Obligations (Lines 4.60+4.70)  |         | \$ 13,739,426 |  |
| 5.    | THA UNENCUMBERED (Non-MTW) CASH (Lines 1-2-4.99)               |         | \$ 21,854,519 |  |
| 6.    | Development Advances - Project Reimbursement upon closing/draw |         | \$ 399,590    |  |
| 6.01  | Housing Hilltop LLLP   | 399,590 |               |  |
|       |  | -       |               |  |



**TACOMA HOUSING AUTHORITY**

**POLICY, INNOVATION, AND  
EVALUATION**



# TACOMA HOUSING AUTHORITY

**DATE:** April 27, 2022

**TO:** THA Board of Commissioners

**FROM:** Katie Escudero  
Interim Director of Policy, Innovation and Evaluation

**RE:** Policy, Innovation and Evaluation (PIE) Department April Board Report

Over the past few months, PIE has continued to leverage THA's Moving to Work (MTW) flexibility to design, evaluate, and continually improve agency policies and programs. During this time, we provided technical assistance and project management to several key agency initiatives, described in more detail below.

## **1. Housing Opportunity Program (HOP)**

Last month, PIE staff completed the public comment period for the proposed Housing Opportunity Program (HOP) changes and this month developed a resolution to sunset the program. Community consult resulted in widespread support for the proposed changes. PIE has been working with Rental Assistance and IT to ensure our systems and processes are in place to support a smooth transition for THA's HOP households. If the resolution is passed, beginning May 1 new households will be issued a Housing Choice Voucher (HCV) and effective July 1, households with a qualifying event (including relocations, portability, landlord requested rent changes, and household composition changes) will be the first wave of current HOP clients to transition to HCV. Other HOP households will transition to HCV at the time of their next annual recertification. If the resolution is passed, we anticipate all HOP households will receive a traditional HCV subsidy by the end of 2023.

In addition to the general HOP program, THA operates two unique HOP subsidy programs serving special populations: the Child Housing Opportunity Program (CHOP) and the College Housing Assistance Program (CHAP). CHOP will be aligned with traditional HCV program rules, eliminating time limits and non-housing related program requirements. This change essentially expands THA's Family Unification Program (FUP) allocation, allowing the Department of Children, Youth, and Families (DCYF) to operate one program.

PIE continues to consult with its education partners on CHAP. Despite continued conversations, PIE staff and the partners are in unanimous agreement that an income-based subsidy will benefit clients. This CHAP subsidy change is included in the resolution to convert HOP to HCV. However, discussions are continuing regarding the time limit, unique program requirements, and whether a unique set aside is warranted.

I would like to specifically call out and recognize Jess Thompson's leadership, creativity, and persistence in this year-long project. Her analysis, report presentation, inclusive community consult, and collaboration with agency stakeholders has been thorough and thoughtful. Many thanks to Jess for applying her skill and care to this project.

## **2. Pioneer Human Services Project-based Voucher Contract**

PIE staff are also seeking Board approval on a resolution to enter into a Project-Based Voucher (PBV) contract with Pioneer Human Services. Pioneer responded to an RFP released in January that sought proposals to help house people who have recently exited incarceration. In 2018, the Board approved a resolution permitting the 25 HOP vouchers set asides for DOC-CHAP (a program envisioned for serving college students exiting corrections) to be converted to PBVs, if needed. As PIE and Rental Assistance reviewed CHAP outcomes, we made the determination that an alternative approach would offer greater benefit to people recently incarcerated. This PBV contract will allow people who have recently exited jail, prison, and/or an in-patient drug treatment facility the ability to lease at one of two properties with reduced screening criteria and support services on site. PBV is an income-based subsidy, which sets an affordable rent for people based on their income. This subsidy model allows people to move in immediately upon their release and provides them the stability needed to seek out employment or other opportunities. Additionally, after one year of tenancy, residents will be eligible to exercise Choice Mobility and may receive a voucher to lease on the private market. This partnership not only addresses people's immediate housing needs, but also provides a path toward long-term housing stability, directly aligning with THA's mission.

## **3. 2022 Moving to Work Report**

PIE submitted its 2021 Moving to Work (MTW) Report to Housing and Urban Development (HUD) on March 31, 2022. The MTW status provides THA flexibility in how it operates programs to better meet the needs of our local community. The report, appended, provides an update on the outcomes of THA's MTW initiatives and investments from January 1, 2021 – December 31, 2021. Some highlights are included below.

In 2021, THA:

- Leveraged its MTW flexibility to adopt emergency operations which helped provide seamless service in the face of the continuing COVID-19 pandemic. Examples of these emergency operations included deferring end of participation dates, extending recertification due dates, and instituting emergency verification policies.
- Far exceeded its utilization goals each month and ended the year with a 101.62% utilization rate on average for MTW utilization.
- Served more than 545 households through local, non-traditional subsidy programs which includes TSHAP, RRH, and Property-Based Subsidies (PBS).
- Closely partnered with Pierce County and the Continuum of Care to begin the lease-up of 135 Emergency Housing Vouchers (EHVs) dedicated to households who are homeless or

- facing housing instability. THA staff worked with the HUD Field Office to apply MTW flexibilities to the EHV's to streamline program operations and ensure equitable treatment across programs.
- Made substantial progress developing and preserving affordable housing units in Tacoma. THA successfully leased up the Rise on 19th in spring 2021. In addition, construction commenced for Hilltop Lofts, a 57-unit permanent supportive housing development in which THA entered into a ground lease and partnership agreement with Horizon Housing Alliance as part of the Housing Hilltop plan.
  - Implemented the redesigned Children Savings Account (CSA) program which provides a \$500 contribution when a student opens a GET 529 prepaid college tuition account and provides ongoing services, support, and education to help the student and family meet their long-term educational and career goals.
  - Launched the new Two Generational Program (2Gen), which provides support to families with children in middle school and/or high school by providing targeted resources, programming, and staff support to children and adults in the household.
  - Utilized its data analysis and evaluative capacity to assess outcomes of the Housing Opportunity Program (HOP). Through the HOP Assessment, THA explored changes to the fixed-subsidy and time-limited nature of the program to ensure more equitable impacts for residents.

These accomplishments, along with many more detailed in the report, were made possible by THA's MTW flexibility which allowed the agency to be nimble and responsive to local priorities and needs. In 2021, this flexibility was critical to THA's ability to pivot and continue to provide excellent customer service and supports to the communities it serves.

#### **4. Data Activities**

Beginning with the establishment of the Data Governance Committee in collaboration with IT in late 2021, PIE has doubled down on its efforts to improve data quality, use, and flow at THA. Our work is two-fold: preparing for a seamless transition into Yardi through supporting data clean-up efforts and over the long-term, instigating a data-driven culture at THA through data analysis best practices and data governance policies. A recent example of this effort is the establishment of a cross-agency work group to collaborate and continually improve reporting and forecasting around HCV utilization. Over the next month, this work group will further refine the Voucher Utilization Report and continue work on a forecasting tool. These tools are critical to agency-wide decisions around budgeting, programming, and policy. Additionally, we recently procured access to CoStar's rental market database. This extensive dataset allows THA to fine tune its payment standards to the local market, track market trends, and plan its activities in response to changing market conditions.

By increasing transparency, awareness, and collaboration around data, THA can be more strategic, planned, and data-driven in its decision making.



# Tacoma Housing Authority 2021 MOVING TO WORK REPORT

Submitted: March 31, 2022



### **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  
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# Section I: Introduction and Overview

*This report covers January 1, 2021 through December 31, 2021.*

In 2021, the COVID-19 pandemic continued to impact the health and economic wellbeing of THA's residents, staff, and community stakeholders. Despite these challenges, THA continued to be adaptive to the needs that arose in order to make our organization stronger and more responsive to the community and people we serve. We balanced our work to address what is most necessary to meet basic needs for our clients, such as continuing our Emergency Operations when it was necessary to protect the safety of our clients. At the same time, we leaned on our data and evaluative capacity to assess the outcomes of our programs and initiate change processes to operate more effectively in the future. For example, 2021 spurred the process of the Children Savings Account (CSA) program redesign, the exploration of potential FSS programmatic changes, and changes to the fixed-subsidy and time-limited nature of the Housing Opportunity Program (HOP) in order to explore more impactful outcomes for clients enrolled in THA's programs.

We continued to use the Design the Hill Master Plan, in which there was a rigorous and dedicated community consultation process from Hilltop residents and partnering organizations, as THA's *North Star* as we carry on the next phase of design and development. Housing Hilltop continues to serve as a model for how to leverage similar community-focused approaches with other large-scale properties we intend to acquire or develop.

This was also a substantial year for aligning our programs with community partners, such as collaborating with Pierce County for the successful implementation of the Emergency Housing Vouchers (EHVs) to serve people experiencing or at-risk of homelessness. This complemented THA's continued commitment and investment in the homeless response system that became increasingly strained as the pandemic worsened housing instability for the most vulnerable and economically insecure.

The dedication of THA's staff allowed us to launch new client-facing programs, such as 2Gen, as well as build from successful initiatives launched in recent years, such as the Renter Readiness Certification and the Landlord Advisory Group. Staff also expressed their creativity and nimbleness as they re-worked processes online and made services more accessible, including the implementation of additional online interfaces and remote capabilities for briefings, inspections, and recertifications.

Finally, we understand there are systemic inequities that impact our programs and people's access to secure, affordable housing. THA made it a priority to embed equitable principles within our work, such as adjusting policy practices that would most likely have disproportionate impacts on Black, Indigenous, and People of Color (BIPOC)-headed households. One starting point was beginning THA's diversity, equity, inclusion, and

belonging (DEIB) work within the organization, and centering the evaluation of outcomes by race, ethnicity, and additional demographic categories, as we did in the HOP assessment. These are the first steps in understanding the scale of the long road ahead to operate programs that authentically center diversity, equity, inclusion, and belonging and we recognize there is much more work ahead for THA and public housing authorities (PHAs) alike.

THA believes that the nature of being a Moving to Work PHA means embracing change, and with that focusing on where things are going right and course correcting when there are indications of a better path forward. In 2021, we continuously committed to this and established a foundation on which to continue in 2022. Our MTW flexibility helped THA make all this possible.

# LONG TERM GOALS & OBJECTIVES

Tacoma Housing Authority's Board has chosen the agency's seven strategic objectives, each with performance measures that guide the agency through the coming years. We summarize them on the following pages and provide full detail as an appendix item, see [Appendix C: THA's Strategic Objectives with Performance Measures](#).

These strategic objectives advance our mission to provide high-quality housing and supportive services to people with low incomes, with a focus on those facing the greatest marginalization. We strive to do this in ways that accomplish two other aims. **First**, we seek to help people succeed, not just as residents but also, as our vision statement and strategic objectives contemplate, as “parents, students, wage earners and builders of assets”. **Second**, we seek to help the City of Tacoma develop equitable affordable housing opportunities. We aim to help build a Tacoma that is a place that households of all incomes, races, and compositions, as our mission statement contemplates, experience as “safe, vibrant, prosperous, attractive, and just.” The following seven strategic objectives are ambitious. THA will require all the tools within reach, including its MTW flexibility.

## 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.

## 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.

## 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.

## 4. Financially Sustainable Operations

THA seeks to be more financially sustaining.

**5. Environmental Responsibility**

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

**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.

**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.



## SHORT TERM GOALS & OBJECTIVES

The pandemic required THA to continue adapting and pivoting to achieve our core mission of providing access to quality, affordable housing while staying authentic to THA's social justice-oriented mission. That work included managing a large and varied portfolio of properties that house marginalized 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 the delivery of food to seniors and other high-risk households.

We highlight the following goals and objectives that continued to drive THA's work in 2021:

### **Aid in Post-Pandemic Response and Recovery**

The COVID-19 pandemic has dramatically disrupted the lives of THA households, staff, and community partners. We anticipated that we would need to continue to adapt, adjust, and respond to resident and community needs as they arose throughout 2021. It was important to ensure THA residents and the broader community of low-income households had access to resources recently made available through the American Rescue Plan Act. As such, we partnered closely with Pierce County and the Continuum of Care to begin the lease-up of 135 Emergency Housing Vouchers dedicated to households who are homeless or facing housing instability.

At the same time, we needed to ensure our current policies were not serving as a barrier to those most in need and could continue to be responsive. In 2021, we used our MTW flexibility to ensure continuity of operations as the COVID-19 pandemic continued. These flexibilities would also serve as the blueprint for THA, should any future national emergencies occur that would disrupt our ability to connect with and serve our households. These flexibilities are described in [Appendix D: THA's Emergency Operations](#).

### **Creating and Preserving Affordable Housing**

Tacoma's rental market continues to grow more expensive and inaccessible to low-income households. Our voucher subsidy struggles to keep pace with the rising rents. Our clients must compete for fewer vacancies with other households that have stronger credit and rental histories. In response, THA is building, buying, and redeveloping properties that we then keep permanently affordable for people with low incomes. Below are highlights of some notable development projects in 2021:

#### Leasing-up The Arlington Drive Youth Campus and The Rise on 19<sup>th</sup>

The completion of Arlington Drive Youth Campus and The Rise on 19<sup>th</sup> were a primary focus for our agency this year. Despite the troubles COVID-19 brought with it this year, we are grateful that these two important development projects remained on schedule. Combined, both developments provided over 100 units of housing dedicated to serving young adults, families and Veterans experiencing homelessness. Leasing began in late-2020 and was completed in early 2021.

#### Housing Hilltop – a neighborhood plan for affordable housing, retail, and community public space

In 2021, we dedicated 57 project-based vouchers for studio units that will provide permanent supportive housing. We began design work in 2020 and continued this process with input from the community throughout 2021, including the exterior façade design and art and input on the community public spaces.

#### Home at Last—a partnership with the YWCA Pierce County

In spring 2021, the YWCA Pierce County began leasing its Home at Last property. The property includes a total of 54 new permanently affordable housing units for people overcoming domestic violence and people experiencing homelessness. Of the 54 apartments, 30 have THA's project-based voucher assistance.

### Providing Support and Resources to our Clients

Amid ongoing uncertainty associated with the pandemic, it was critical for THA to remain steadfast in building meaningful partnerships and uncovering resources to provide THA residents with the supports and services they need to stay stably housed and pursue their aspirations and goals. THA's Client Support and Empowerment Department supported this goal in 2021 through the following activities: initiating the redesign and implementation of its Family Self-Sufficiency (FSS) program to develop an attractive and equitable program that centers the whole family; providing support to families with children in middle school and/or high school by providing targeted resources, programming, and staff support to children and adults in the household through the recently implemented Two Generational Program (2Gen); and launching the redesigned Children's Savings Account (CSA) program that provides a \$500 contribution when a student opens a GET 529 prepaid college tuition account and ongoing services, support, and education to help the student and family meet their long-term educational and career goals.

### Embed Diversity, Equity, and Inclusion in THA's Work

While THA has always seen itself as a social justice agency with a technical mission, we acknowledge to do this work right we must center diversity, equity, inclusion, and belonging (DEIB) in *all* aspects of our operations, programs, and services. In recent years, THA has taken concrete steps to advance DEIB within the organization with much more work ahead beyond 2021. This progress includes forming a Diversity, Equity, and Inclusion Committee to help further THA's DEIB work with an initial focus of helping to align Board and staff goals and strategies. The committee oversaw

the procurement of a DEIB consultant in late 2021 whose primary goal is to conduct an agency-wide assessment and develop THA's strategic plan to drive our DEIB work moving forward.

### **Continually Improve Operations, Programs, and Services**

As an innovative PHA that holds the quality of its programs to the highest degree, it is important to continuously learn and evolve our operations, programs, and services to ensure we can better meet resident needs, ease the administration of THA's housing programs, and improve our operational systems. In 2021, THA began assessing its current IT software platform and exploring other options that could benefit THA operations, customer service, oversight, and reporting. THA sought a comprehensive tool that would connect the organization and better manage data, enabling us to make data-driven decisions and continually improve operations and programs, resulting in the selection of Yardi. We also continued to closely monitor and evaluate the outcomes of our time-limited, fixed rental subsidy, the Housing Opportunity Program. The increasingly expensive and out-of-reach housing market coupled with the devastating economic impacts of the pandemic, particularly on historically marginalized populations, require THA to assess the effectiveness of this model in addressing the needs of the individuals and families we serve. It is through this continuous quality improvement that we become a better PHA to serve our residents and community.

## **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 |      |   |
| Hilltop Lofts | 57                                     | 57     | No   | Studio units of permanent supportive housing for individuals exiting homelessness |

|    |    |   |
|----|----|---|
| 57 | 57 | 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:

N/A

## 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 |        | PLANNED STATUS AT END OF PLAN YEAR* | RAD? | DESCRIPTION OF PROJECT        |
|------------------------|----------------------------------|--------|-------------------------------------|------|-------------------------------|
|                        | Planned*                         | Actual |                                     |      |                               |
| Arlington Youth Drive  | 58                               | 58     | Leased/Issued                       | No   | Youth and Young Adult Housing |
| Bay Terrace 1          | 20                               | 20     | Leased/Issued                       | No   | THA Family Housing            |
| Bay Terrace 2          | 52                               | 52     | Leased/Issued                       | No   | THA Family Housing            |
| Bay Terrace – RAD      | 26                               | 26     | Leased/Issued                       | Yes  | THA Family Housing            |
| Eliza McCabe Townhomes | 10                               | 10     | Leased/Issued                       | No   | Mercy Housing Family Housing  |
| Flett Meadows          | 13                               | 13     | Leased/Issued                       | No   | LASA Family Housing           |
| Guadalupe Vista        | 38                               | 38     | Leased/Issued                       | No   | CCSWW Family Housing          |
| Harborview Manor       | 147                              | 147    | Leased/Issued                       | No   | Affordable Senior Housing     |
| Hillside Gardens       | 8                                | 8      | Leased/Issued                       | No   | THA Family Housing            |
| Hillside Terrace 1500  | 12                               | 12     | Leased/Issued                       | No   | THA Family Housing            |
| Hillside RAD           | 33                               | 33     | Leased/Issued                       | Yes  | THA Family Housing            |
| Hillside 2             | 13                               | 13     | Leased/Issued                       | No   | THA Family Housing            |
| Home at Last           | 30                               | 30     | Leased/Issued                       | No   | YWCA Family Housing           |

| PROPERTY NAME                | Number of Project-Based Vouchers |              | PLANNED STATUS AT END OF PLAN YEAR*                         | RAD? | DESCRIPTION OF PROJECT                           |
|------------------------------|----------------------------------|--------------|---|------|--|
|                              | Planned*                         | Actual       |   |      |  |
| Nativity House               | 50                               | 50           | Leased/Issued   | No   | CCSWW Permanent Supportive Housing for adults    |
| New Tacoma Phase 2           | 8                                | 8            | Leased/Issued   | No   | Senior housing                                   |
| Olympus Apts.                | 18                               | 18           | Leased/Issued   | No   | KWA affordable housing units at 60% AMI or below |
| Pacific Courtyards           | 23                               | 23           | Leased/Issued   | No   | MDC transitional family housing                  |
| Rialto Apts.                 | 52                               | 52           | Leased/Issued   | No   | PHS affordable housing units at 50% AMI or below |
| Salishan 1-7 <sup>1</sup>    | 340                              | 340          | Leased/Issued   | No   | THA Family Housing                               |
| Salishan RAD                 | 290                              | 290          | Leased/Issued   | Yes  | THA Family Housing                               |
| The Rise at 19 <sup>th</sup> | 64                               | 64           | Leased/Issued   | No   | THA Family housing                               |
| Tyler Square                 | 15                               | 15           | Leased/Issued   | No   | TRM Family Housing                               |
| Renew Tacoma Housing         | 456                              | 456          | Leased/Issued   | Yes  | THA Senior/Disabled Housing                      |
|                              | <b>1,776</b>                     | <b>1,776</b> | <b>Planned/Actual Total Existing Project-Based Vouchers</b> |      |  |

\* 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

<sup>1</sup> Please note: Salishan 7 never had public housing units and will not be found in PIC

Please describe differences between the Planned and Actual Number of Vouchers Project-Based:

N/A

### 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   |
|--|
| Construction commenced for Hilltop Lofts, a 57-unit permanent supportive housing development, in which THA entered into a ground lease and partnership agreement with Horizon Housing Alliance as part of the Housing Hilltop plan.  |
| THA will continue to seek to acquire existing housing in the market to preserve affordable housing to households earning up to 80% of the area median income (AMI).  |
| THA is in discussion with Tacoma Public Schools for acquisition or other possible options for the Gault School site. This includes a role THA may play if the school is demolished and the park across the street is taken out of consideration for development.   |
| THA has sold the last seven lots of in Area 2B of Salishan. These lots were planned to be developed into market rate rentals. THA received an offer to purchase the lots by a small, minority owned Tacoma based firm. They will be developing 18 market-rate rental units.  |
| THA completed its RAD conversion of Salishan and Hillside properties in 2019. The disposition of its scattered site public housing through Section 32 has also been completed, except for one remaining unit. This left THA with 719 public housing units available for use under Faircloth. THA continued to explore ways to place Public Housing Faircloth units in new acquisitions and new developments. |

### 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 2019, THA converted all but 5 units under the RAD. THA does not intend to close its PH ACC and will keep it open for the purpose of developing new PH units. THA received minimal Capital funds in 2021, yet had funds carried over from 2020 that were reflected in the budget and transferred to 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                                      | 60            | 4                              | 5            |
| MTW Housing Choice Vouchers (HCV) Utilized | 49,747                                  | 49,511        | 4,146                          | 4,126        |
| Local, Non-Traditional: Tenant-Based ^     | 2,396 <sup>2</sup>                      | 1,889         | 200                            | 157          |
| Local, Non-Traditional: Property-Based ^   | 4,260                                   | 4,656         | 355                            | 388          |
| Local, Non-Traditional: Homeownership^     | 0                                       | 0             | 0                              | 0            |
| <b>Planned/Actual Totals</b>               | <b>56,451</b>                           | <b>56,116</b> | <b>4,705</b>                   | <b>4,676</b> |

<sup>2</sup> Under HUD approval, THA includes LNT: Tenant-Based households six months post-participation. See Activity 15 for further details.

**Please describe any differences between the planned and actual households served:**

MTW Public Housing – THA recently brought back online a public housing unit that was initially repositioned for use by another service partner but subsequently determined not needed.

LNT: Tenant-Based – Capacity limitations from the contracted TSHAP provider caused an impact on lease-ups this program.

LNT: Property-Based – Some properties experienced higher-than-usual turnover rates for which THA has since worked with the properties to resolve and establish preventative measures.

MTW HCV – Planned number of households served were based on predictions based on information available at the time of analysis. Pandemic-related challenges in the housing market made it more difficult to make predictions and to achieve intended targets, though it should be noted THA far exceeded its utilization goals each month and ended the year with a 101.62% utilization rate on average in 2021.

| Local Non-Traditional Category <sup>7</sup> | 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  | 2,396 <sup>3</sup>              | 1,889        | 200                               | 157        |
| Property-Based                              | Creation & Preservation of Affordable Housing/16 | 4,260                           | 4,656        | 355                               | 388        |
| Homeownership                               | N/A  | 0                               | 0            | 0                                 | 0          |
| <b>Planned/Actual Totals</b>                |  | <b>6,656</b>                    | <b>6,545</b> | <b>555</b>                        | <b>545</b> |

<sup>3</sup> Under HUD approval, THA includes LNT: Tenant-Based households six months post-participation. See Activity 15 for further details.

\* 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 |
|---------------------------|---|--------------------------------------|---|--|
| THA Consolidated Waitlist | Other/ Consolidated waitlist for THA voucher programs and THA site-based waiting list | 1,550                                | Closed                                      | 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 2021, THA maintained and exceeded its 95% utilization goal and consequently did not open its waitlist or issue new HOP subsidies for all households. However, THA analyzed the waitlist data mid-year and identified the need to open our waitlist for large families (9+ persons). With the addition of housing units that could accommodate larger families, THA did a partial opening of its waitlist specifically for households with 9-10 people. The waitlist opening period was between November 15 – December 3, 2021. |

# 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                              | 1   |
| 49%-30% Area Median Income                              | 32  |
| Below 30% Area Median Income                            | 177   |
| <b>Total Local, Non-Traditional Households Admitted</b> | <b>210</b>  |

## 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%                   |
| <b>Totals</b>   | <b>329</b>                              | <b>3,829</b>  | <b>0</b>              | <b>4,347</b>        | <b>100%</b>             |

\* “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 | BASLINE 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%                   | 2,234                                     | 49.27%   | 6.69%   |
| 2 Person    | 19.77%                   | 869                                       | 19.17%   | -0.60%  |
| 3 Person    | 15.62%                   | 620                                       | 13.67%   | -1.95%  |
| 4 Person    | 10.58%                   | 341                                       | 7.52%  | -3.06%  |
| 5 Person    | 6.60%                    | 263                                       | 5.80%  | -0.80%  |
| 6+ Person   | 4.85%                    | 207                                       | 4.57%  | -0.28%  |
| TOTAL       | 100%                     | 4,534 <sup>4</sup>                        | 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.

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<sup>4</sup> 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 in the HUD Form 50900 used to derive “Actual Households Served.”



**Please describe the justification for any variances of more than 5% between the Plan Year and Baseline Year:**

We observed a notable difference in one person households because we utilized MTW to direct our subsidies to people experiencing homelessness and other special populations whose household composition tends to include single person households in Tacoma.

## 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         | 21   | Exited or graduated with market rent burden <=50%        |
| Regional Approach to Special Purpose Housing/15 | 1  | 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                       | 4  | Exited or graduated with market rent burden <=50%        |
|   | 4  | <i>(Households Duplicated Across MTW Activities)</i>     |
|   | 30   | <b>Total Households Transitioned to Self Sufficiency</b> |

\* 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 2021.

| 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 2021.

**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 2021 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 voucher for THA developments**

Traditionally, HUD mandates that PHAs not spend more than twenty (20) percent of their Annual Budget Authority (ABA) toward Project-based Vouchers. THA received permission through MTW to go above this threshold toward PBVs in projects owned and operated by the agency.

THA removed the cap on project-based vouchers for its own developments which will allow THA to finance more developments in the future.

- **Established a reasonable competitive process and contract terms for PBV assistance**

THA established a reasonable competitive process and contract terms, including 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**

THA began conducting Housing Quality Standards (HQS) inspections on units it owns or has interest in.

- **Modified Choice Mobility options for non-RAD, PBV households**

THA used this flexibility to waive the Choice Mobility option for PBV households in previous years. THA's board approved policy changes that would allow all PBV holders to exercise CM given that households meet the following conditions: 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.

- **Streamline PBV program**

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.

**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 in 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 providers more easefully to serve households that have experienced homelessness and/or need supportive services provided by the community partners.

**Update:** There were no updates to this activity in 2021. However, in comparison to pre-pandemic levels, THA conducted significantly less inspections due to the COVID-19 pandemic and social distancing requirements. Beginning March 2020 and continuing throughout 2021, THA limited inspections to initial and turnover inspections only.

| CE # 1: Agency Cost Savings  |          |                         |         |                     |
|--|----------|-------------------------|---------|---------------------|
| Unit of Measurement  | Baseline | Benchmark               | Outcome | Benchmark Achieved? |
| <b>Total cost of task in dollars (decrease). Cost of in-house PBV inspections compared to third party.</b> | \$49,560 | \$39,648 (20% decrease) | \$7,110 | 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 2021.

**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 – Starting in 2021, 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 2021. 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 2021 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 over-housed, 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 to transfer to more suitable housing by allowing them to transfer between property-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. Further, a large majority of THA's public housing units have been converted to RAD-PBV. By the end of 2021, THA had a total of 5 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 2021 was (0) zero. It should be noted, starting in the 2022 MTW Plan, THA has closed this activity out, due to the limited number of PH 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 | 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 2021.

**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 2021 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).

THA's hardship policy for MTW-HCV households states that households may submit a written request for a hardship exemption if they are paying the minimum rent but are no longer able to do so due to financial hardship. For MTW elderly/disabled households they must meet one of the following requirements: (1) income changes will require household to pay more than 40% of their income as rent; or (2) household has zero income. THA's hardship policy also required households to obtain third-party documentation to show that they had applied for other hardship programs. THA recognized that this was an unnecessary burden for households and made it extremely difficult for households who income-qualified for a hardship to receive one. In 2021, THA has revised its hardship policy to remove the third-party documentation requirements.

**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 2021, 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 2021, **1,232** 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.

2021 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? |
| <b>Total cost of task in dollars (decrease).</b> | \$23,730 cost to complete all elderly/disabled certifications FY 2021 impacted by this activity | \$15,899 (33% decrease from baseline) | \$8,341 in staff costs related to processing fixed income reviews. | Met                 |

| CE # 2: Staff Time Savings  |   |                          |   |                     |
|---|---|--------------------------|---|---------------------|
| Unit of Measurement   | Baseline  | Benchmark                | Outcome   | Benchmark Achieved? |
| <b>Total time to complete the task in staff hours (decrease).</b> | 856 hours to complete all elderly/disabled certifications impacted by this activity | 573 hours (33% decrease) | 283 hours spent completing fixed income reviews | Met                 |

| CE # 5: Increase in Agency Rental Revenue  |          |           |  |                     |
|--|----------|-----------|--|---------------------|
| Unit of Measurement  | Baseline | Benchmark | Outcome  | Benchmark Achieved? |
| <b>Total Household contribution towards housing assistance (increase). Average monthly tenant share.</b> | \$0      | \$286     | \$252 average monthly tenant share (increase from last year) | Not Met             |

**Hardships:** Four households in this program were granted hardships in 2021

**Actual Non-Significant Changes:**

***Emergency Operations:*** As learned through the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants, and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Implement emergency verification policies:** During times of declared emergencies, THA would implement the emergency operations verification policies as outlined in the “Local Income and Asset Verification Policy” activity. This would include treating all forms of verifications equally and allowing participants to self-certify over the phone, by e-mail or other means in lieu of a signature.
- **Extend regular recertification due date:** THA extended the validity of the household’s most recent completed recertification by one year. The recertification will be due one year from the original due date.

**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 2021 through an Annual MTW Plan amendment.

**Challenges in Achieving Benchmarks and Possible Strategies:** For CE#5, households in the Tacoma area 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. Additionally, as THA has intentionally sought to align its programs with the homeless response system, THA has been receiving an increasing number of referrals from the Tacoma/Pierce County Coordinated Entry System enabling us to serve more people experiencing or at-risk of homelessness. This population faces more barriers to income progression, as participants tend to have higher service needs and more vulnerability when entering THA’s programs than the general low-income population. THA and service partners focus on housing stabilization first with goals of financial self-sufficiency as they continue to be residing in THA’s assisted units.

## 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).

THA’s hardship policy for MTW-HCV households states that households may request in writing a hardship exemption if they are paying the minimum rent but are no longer able to do so due to financial hardship. For MTW work-able households they must meet one of the following requirements: (1) income changes will require household to pay more than 50% of their income as rent; or (2) household has zero income. THA also requires that MTW work-able households show that they have applied for unemployment. THA’s hardship policy previously required households to obtain third-party documentation to show that they had applied for other hardship programs. THA recognized that this was an unnecessary burden for households and made it extremely difficult for households who income-qualified for a hardship to receive one. THA removed this verification requirement.

**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 2021, **1,539** 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? |
| <b>Total cost of task in dollars (decrease).</b> | \$36,284 cost to complete all work-able certifications impacted by this activity | \$18,142 (50% decrease) | \$19,361 staff costs | Not Met             |

| CE # 2: Staff Time Savings  |  |                          |                 |                     |
|---|--|--------------------------|-----------------|---------------------|
| Unit of Measurement   | Baseline   | Benchmark                | Outcome         | Benchmark Achieved? |
| <b>Total time to complete the task in staff hours (decrease).</b> | 1,309 hours to complete all work-able certifications impacted by this activity | 654 hours (50% decrease) | 657 staff hours | Not Met             |

| CE # 5: Increase in Agency Rental Revenue  |          |                                      |                                    |                     |
|--|----------|--------------------------------------|------------------------------------|---------------------|
| Unit of Measurement  | Baseline | Benchmark                            | Outcome                            | Benchmark Achieved? |
| <b>Total household contribution towards housing assistance (increase). Average monthly tenant share.</b> | \$0      | \$731 (50% of 2-BD payment standard) | \$435 average monthly tenant share | Not met             |

| SS #1: Increase in Household Income   |          |           |  |                     |
|---|----------|-----------|--|---------------------|
| Unit of Measurement   | Baseline | Benchmark | Outcome  | Benchmark Achieved? |
| <b>Average earned income of households affected by this policy in dollars (increase).</b> | \$12,372 | \$21,060  | \$28,476<br>*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 | 471 households | Not met             |
|   | 21%                       | 45%            | 31%            | Not met             |
| 2) Employed part-time   | 446 households            | 693 households | 262 households | Not met             |
|   | 29%                       | 45%            | 17%            | Not met             |
| 3) Enrolled in Educational Program  | 0                         | TBD            | NA             | In progress         |
|   | 0%                        | TBD            | NA             | In progress         |
| 4) Enrolled in Job Training   | 0                         | TBD            | NA             | In progress         |
|   | 0%                        | TBD            | NA             | In progress         |
| 5) Unemployed   | Cannot establish baseline | 154            | 806            | Not met             |
|   |                           | 10%            | 52%            | 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 | 220 work-able households (14% of work-able receiving TANF) | Met                 |

| SS #8: Households Transitioned to Self Sufficiency   |  |  |  |                     |
|--|--|--|--|---------------------|
| Unit of Measurement  | Baseline   | Benchmark  | Outcome  | Benchmark Achieved? |
| <b>Work-able households on traditional MTW rent calculation exiting the program with rent burden &lt;50%</b> | <p>Exited with market rent burden &lt;=50%:<br/>NA</p> <p>Average market rent burden (all traditional work-able): NA</p> | 50% of exiting or graduating households will have market rent burden <=50% | <p>Exited or graduated with market rent burden &lt;=50%: 21 households (70% of all W/A exits)</p> <p>Average market rent burden (all traditional work-able): 78%</p> | Met                 |

**Hardships:** Four households in this program were granted hardships in 2021.

**Actual Non-Significant Changes:**

**Emergency Operations:** During the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants, and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Implement emergency verification policies:** During times of declared emergencies, THA would implement the emergency operations verification policies as outlined in the “Local Income and Asset Verification Policy” activity. This would include treating all forms of verifications equally and allowing participants to self-certify over the phone, by e-mail or other means in lieu of a signature.
- **Extend regular recertification due date:** THA would extend the validity of the household’s most recent completed recertification by one year. The recertification will be due one year from the original due date.

**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 2021.

**Challenges in Achieving Benchmarks and Possible Strategies:** For SS#3, THA initiated a process that sought to track the number of households enrolled in an educational and/or job training program for this population; however, THA has experienced limitations with its administrative data system. THA will transition to a new vendor in 2022-2023 that will better serve our data needs. As we begin the data system transition, THA will review its capabilities to determine the relevance and viability of reporting on these measures continuously. Regarding outcomes for the household contribution towards housing assistance and employment, household incomes are stagnant and not rising as rapidly as increasing rental costs in the private market. Since the rental subsidies are income-based, THA absorbs more of the rent payment. It should also be noted that THA has intentionally sought to align its programs more with the homeless response system. As such, THA has been receiving an increasing number of referrals from the Tacoma/Pierce County Coordinated Entry System and serving people experiencing or at-risk of homelessness. This population faces more barriers to income progression, as participants having higher service needs and vulnerability when entering THA’s programs. THA and service partners focus on housing stabilization first with goals of financial self-sufficiency as they continue to be residing in THA’s assisted units.



## 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.

**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 2021 there were only **six (6) 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  | \$59    | 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 2021.

**Actual Non-Significant Changes:**

**Emergency Operations:** During the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants, and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Weigh all forms of income verification equally:** THA would accept self-certifications for income with equal weight as other forms of income verifications. THA will allow households to self-certify over the phone, by e-mail or other means in lieu of a signature. This policy was consistent with allowances from HUD's coronavirus waivers through HUD PIH 2021-14 (HA).

**Actual Changes to Metrics/Data Collection:** No changes to metrics or data collection for this activity in 2021.

**Actual Significant Changes:** No significant changes were made to this MTW activity in 2021 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.

With MTW flexibility THA revised its interim processing and verification policies in the following ways:

- THA will no longer require an interim increase for every income increase reported;
- THA will only process interim decreases when the income loss is 20% or more and is expected to last more than 90 days;
- THA will accept all interims online.

**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 2021, THA processed **79 interims** that were due to a notable decrease in the family's income. Of the total reported changes of income THA received, most of them 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   | \$1,869 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 | 63 hours to process rent decreases | Met                 |

**Hardships:** Of the interims completed in 2021, THA processed **28** COVID-19-related extensions for households with time-limited subsidies in 2021.

**Actual Non-Significant Changes:**

**Emergency Operations:** During the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Remove 90-day and 20% rule requirements:** During states of emergencies, THA would remove the 90-day requirement and the 20% rule for processing interims for income decreases.
- **Implement emergency verification policies:** THA would implement the emergency operations verification policies as outlined in “Local Income and Asset Verification Policy” activity. This will include treating all forms of verifications equally and allowing participants to self-certify over the phone, by e-mail or other means in lieu of a signature.

**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 2021 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 Housing Authority has calculated the average utility allowance currently provided to housing choice voucher and public housing program participants, and revised allowances. The revision provides each household responsible for tenant supplied utilities with the average allowance based upon unit bedroom size. Households have a more simplified explanation of utility allowance benefits and the Housing Authority staff now selects an allowance based only on unit size instead of determining individual allowances for every unit leased.

**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 check 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 2021.

| CE # 1: Agency Cost Savings               |          |           |                                      |                     |
|---|----------|-----------|--------------------------------------|---------------------|
| Unit of Measurement                       | Baseline | Benchmark | Outcome                              | Benchmark Achieved? |
| Total cost of task in dollars (decrease). | \$6,793  | \$3,397   | \$1,165 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 | 39 hours | Met                 |

**Hardships:** No households requested hardships due to this activity in 2021.

**Actual Non-Significant Changes:** No changes or modifications to the MTW activity were made in 2021.

**Actual Changes to Metrics/Data Collection:** No changes in 2021.

**Actual Significant Changes:** No significant changes were made to this MTW activity in 2021.

**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 2021 there was a total of **205 households** in billing status. This is a 120 household decrease from the baseline of 325 households prior to implementation of this activity in 2011. Beginning in 2021, THA updated this policy to allow port outs occurring within Pierce County boundaries due to the increasing circumstances in which households look to different housing options in other parts of the county. This practice was aligned with policies already enabled by HUD through the implementation of the HUD Emergency Housing Vouchers with Pierce County starting mid-2021.

| 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) | \$6,721 | Not met             |

| 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) | 275 hours | Not met             |

**Actual Non-Significant Changes:** No changes or modifications to the MTW activity were made in 2021.

**Actual Changes to Metrics/Data Collection:** THA removed the metric for CE #1 (b): Agency Cost Savings – Port Out Administrative Billing, as this metric was duplicative of CE#1 (a).

**Actual Significant Changes:** No significant changes were made to this MTW activity in 2021.

**Challenges in Achieving Benchmarks and Possible Strategies:** THA did not meet its benchmark as the majority of port-out requests were due to emergency transfers and reasonable accommodations, all reasons which are allowed under this policy and for which THA continues to support when households submit requests.



## 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) to serve 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.

**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.

**Update:** At the end of the year, THA's Rapid Rehousing investment reached 190 households who were experiencing homelessness in Tacoma/Pierce County in 2021. By the end of 2021, 32% of Rapid Rehousing households experienced increases in their overall income, with the median change

for households being \$895. There were 12% of households who changed their earned incomes, with the median change in earned income being \$1,148. Of households who exited projects to permanent housing over the past two years most remained housed – 82% of households did not return to homelessness within 24 months.

In 2021, TSHAP provided 109 households with housing and/or supportive service assistance. Of these, 47 were one-time payments for households needing preventative or diversion assistance and 62 households received Rapid Rehousing services which helped them exit shelters or the streets into private housing. By the end of 2021, 25% of TSHAP households experienced increases in their overall income, with the median change for households being \$1,480. There were 12% of households who changed their earned incomes, with the median change in earned income being \$1,598. Of households who exited projects to permanent housing over the past two years most remained housed – 82% of households did not return to homelessness within 24 months.

| CE # 4: Increase in Resources Leveraged           |          |           |   |                     |
|---|----------|-----------|---|---------------------|
| Unit of Measurement                               | Baseline | Benchmark | Outcome   | Benchmark Achieved? |
| Amount of funds leveraged in dollars (increased). | \$0      | \$150,000 | <p>TSHAP (for period 3/2020 – 12/31/2021):</p> <p>\$400,000 for housing and supportive services from Pierce County;</p> <p>\$356,461 for supportive services from THA philanthropic funds;</p> <p>\$35,646 for administration from Pierce County;</p> <p>\$125,000 for THA program oversight from Tacoma Public Schools</p> | 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). | 0 households | 120 households | 109 unique TSHAP families and 190 unique RRH households housed in 2021. | 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: 1 household (1% of all RRH exits in 2021) | 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 | 109 unique TSHAP families and 190 unique RRH households housed in 2021. | 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 | 109 unique TSHAP families and 190 unique RRH households housed in 2021. | Met                 |

**Actual Non-Significant Changes:** Since the launch of TSHAP in fall 2020, THA has been consistently monitoring the progress of the program and has identified ongoing programmatic challenges due to a lack of technical capacity and staff resources from the contracted provider. THA also found TSHAP to be additionally duplicative and burdensome for Pierce County and THA to administer. Because of these findings, THA is sunsetting TSHAP at the completion of the contract term, which is now at the end of 2022. As it gets closer to the end of the program, THA will re-evaluate options with the County and Tacoma Public Schools to determine how to redirect THA's investments for homeless students and their families more effectively.

**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 2021.

**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:** This MTW activity allows THA to activate its broader uses of fund flexibility so the agency can dedicate MTW dollars to the construction and acquisition of affordable housing units. These affordable housing units (rented at or below 80% of AMI) can be any bedroom size and are located WITHIN the City of Tacoma. All units would require HQS inspections per PIH Notice 2011-45. THA also recognizes that this entire activity is under the parameters of PIH Notice 2011-45 under the category of Rental Subsidy Programs. THA will abide with PIH Notice 2011-45 when implementing this activity.

THA seeks to increase housing choices for low-income families using as many avenues as possible. THA uses this flexibility in various ways. The following details how THA has used MTW flexibility on the construction and acquisition of affordable housing units:

### 1. Property-Based Rental Subsidies

This activity will include the use of MTW funds for Property-Based Rental Subsidies to make contributions to properties that agree to make units available at a rental price affordable to very low-income households. Under this activity, THA would contract with properties owned in whole or in part by THA or with other private owners. Under these contracts, owners would agree to set rents at prices affordable to households making up to 50% of area median income (AMI). Rents would not be based on tenant income but rather would be fixed rents with fixed subsidies based on the AMI restrictions set by unit or by property. Owners agreeing to make units affordable to households earning 30% of AMI may receive subsidies that are higher than properties set aside for households earning 50% of AMI. The rents and subsidies would be set 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. HUD Fair Market Rents will not be used to set rents.

During the application and negotiation process the property owner commits to serve households below 30%, 40% and/or 50% of the area median income (AMI) (see table below for these income levels). Based on the income levels chosen, the property owner advertises its vacancies at rents equal to the maximum rents for the low-income housing tax credit program for each income level. Households living in these properties would not use other THA subsidies to assist with rent.

2021 maximum rents (HERA rent limits) in Pierce County are shown on the table below.

| Set-aside Percentage | Studio | 1-Bedroom | 2-Bedroom | 3-Bedroom | 4-Bedroom | 5-Bedroom |
|----------------------|--------|-----------|-----------|-----------|-----------|-----------|
| 30%                  | 478    | 512       | 615       | 710       | 792       | 874       |
| 35%                  | 558    | 598       | 717       | 829       | 924       | 1020      |
| 40%                  | 638    | 683       | 820       | 947       | 1057      | 1166      |
| 45%                  | 717    | 768       | 922       | 1065      | 1189      | 1312      |
| 50%                  | 797    | 854       | 1025      | 1184      | 1321      | 1458      |
| 60%                  | 957    | 1025      | 1230      | 1421      | 1585      | 1749      |

## 2. Acquisition

THA seeks to acquire existing rental housing throughout Tacoma and in particular, neighborhoods where THA doesn't have a strong presence. 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. These properties are acquired with a combination of bond, HOME, CDBG local impact investors and THA resources. For future new construction or re-developments THA intends to use GCCM or design build as a form of design and/or construction procurement for construction projects.

THA plans to use MTW dollars to pursue the following projects that are in THA's Real Estate Development pipeline:

- **Housing Hilltop:** Housing Hilltop will provide 4-8 story buildings with a mix of retail and/or commercial space on the ground floor and a mix of very low income and workforce housing units (up to 60% of AMI) in a mix of bedroom configurations. Most of the units will be 1 and 2-bedrooms although some larger sized units will also be included for large families. The four buildings will have some shared amenities and parking. The four parcels share an alley which THA plans to include as active space by doing creative alley activation projects to enhance the living experience for residents and to build community in the neighborhood. Financing would likely be a combination of THA unrestricted funds, private debt, and tax credits.

Phase I will be 57 studio units of permanent supportive housing for individuals exiting homelessness. This project, referred to as Hilltop Lofts, will be done with a local non-profit partner. Phase II will be orientated toward low-income individuals and families in a mix of

studio, 1-, 2- and 3-bedroom units.

This historically Black neighborhood is rapidly changing and signs of gentrification and displacement are evident. The goal is to provide housing for those who are in danger of or who have been displaced. With its close proximity to downtown and the hospitals, its many current and future mass transit options, and the neighborhood's history as an artist community, THA's new units will provide affordable housing to low wage earners close to transit and employment and serve as a catalyst for inclusive growth and development of Hilltop. It will also help this gentrifying area remain affordable to lower income households.

- **The 1800 Hillside Terrace:** This activity was used in 2012 to help with the development of Bay Terrace, formerly Hillside Terrace. Phase 1 (2014) and Phase II (2017) for Bay Terrace are completed and the units are being occupied. THA will complete the third phase of Hillside Terrace redevelopment plan. The Rise on 19<sup>th</sup> (Phase III) will continue the theme of a strategic investment in the Hilltop neighborhood through the production of high quality, well designed multifamily units that integrates into the neighborhood, takes advantage of public transit and ensures that affordable rental housing will be available in the neighborhood for years to come. The Rise on 19<sup>th</sup> provides an additional 64 rental housing units in a mixed-income setting.

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 serves individuals with disabilities, an additional 20% set-a-side serves households experiencing homelessness and 28 units are filled with families with children.

The unit mix consists of 1- and 2-bedroom homes affordable to households earning between 30% and 60% AMI. A 20% special needs

set-a-side is programmed for persons with disabilities and another 20% is for individuals/small families experiencing homelessness. THA provides Project-based Section 8 vouchers for the entire project.

- **Intergenerational Housing:** THA continues to explore an intergenerational housing project and may consider developing this project at Hillsdale Heights. a development project that will serve a multigenerational community where traumatized children receive love and care from kinship and adoptive parents and live in a community with seniors who by living there agree to be respite care givers, honorary grandparents and tutors to the families. There are more 3,100 children in foster care who need a forever family, a record number of elders who want to stay connected, and parents and families who need support to raise these very special children. This development will be built on a foundation of community services in support of the community. THA will work in partnership to begin planning for this project.
- **Aviva Crossing:** THA acquired a 7-acre retail and commercial area that is a good transit-oriented development opportunity. It is also directly across the street from the Tacoma Community College. THA has completed a master planning process for this property. Up to 600 units may be developed on this location. THA expects to develop 150 units of housing affordable to households earning 60% or less of the Area Median Income. The balance of the housing will be developed by private sector partners who purchase the land and develop in accordance with the Master Plan Design guidelines. These multifamily properties will offer a mix of commercial and retail space, along with market rate rental housing. It is anticipated that this development will add households sufficient to support the retail and commercial spaces, while offering a high quality, mixed income project that will add vitality to the neighborhood.
- **1500 Block:** THA proposes to redevelop a property referred to as the 1500 Block. This property will be redeveloped with one and two-bedrooms that are conducive to low-income individuals and small households using LIHTC.

**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. In 2020, two assisted living facilities serving Medicaid Seniors in Pierce County closed 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 also partnered with five properties near the University of Washington – Tacoma and Tacoma Community College to house homeless or near-homeless students.

Acquiring existing rental housing that is affordable to households earning 80% or less of AMI remains one of THA's rental housing preservation strategies. By leveraging MTW dollars in our development and acquisition activities, we have been able to redevelop entire communities, bringing opportunity and resources to areas that are historically underinvested in. It has also led to the success of many private-public partnerships in the building and design of many affordable housing units, which have served as models for other communities.

**Update:** 2021 was an impactful year and yielded the following results:

- **Property-Based Rental Subsidies:** THA continued to place property-based subsidies in seven (7) different properties – preserving 344 affordable housing units. Two of the properties provide housing and services to Medicaid eligible seniors in need of dementia care. The remaining five provide housing to local college students who are experiencing homelessness.
- **Housing Hilltop:** In 2021, THA entered into a ground lease and partnership agreement with Horizon Housing Alliance for Hilltop Lofts. As part of this partnership, Horizon would develop, own and manage 57 studio and one-bedroom units for permanent supportive housing. Design would be consistent with the Design the Hill Master Plan that was the outcome of an extensive community process. In addition, THA is developing the remaining three properties it owns in the Hilltop with studio, one, two- and three-bedroom homes that are affordable to household earning up to 60% of the Area Median Income. Financing for the projected 200-239 units is a combination of tax-exempt bonds, 4% Low Income Housing Tax Credit (LIHTC) and THA managed funds. THA entered into a Design Build contract with Walsh Construction in October 2021 and the company selected SMR Architects as the design partner. This past year, THA secured funding from Amazon's Housing Equity Fund to help finance the project.
- **The 1800 Hillside Terrace:** Phase III, known as The Rise on 19th, was completed in early 2021 after experiencing some completion delays due to COVID-19. The Rise on 19<sup>th</sup> provides 64 units of affordable housing, including housing for families exiting homelessness and veterans. THA also converted 14 PBV units to HUD-VASH PBV to address the HUD-VASH voucher challenges and increasing needs for people experiencing homelessness in Tacoma. Another 14 units were reserved for persons with disabilities and their families. The final lease update was May 1, 2021 and THA staff worked diligently in early 2021 to meet their 100% leasing goal. For the lease up process, THA prioritized the use of its transfer waitlist to fill vacant units. This was a strategic decision to fill vacancies quickly, as the

newly available units at The Rise helped to provide right-sized housing for households who became over- or under-housed in THA's portfolio and for which there were no alternatives.

- **Acquisition:** In 2021, THA continued to pursue new acquisition or development opportunities to find opportunities to create or preserve affordable housing. This past year, THA authorized the acquisition of North Highland Court Apartments, a 35-unit property with 28 one-bedroom units and 7 two-bedroom units. THA also authorized the acquisition of the Saravida property.
- **Intergenerational Housing:** THA staff are in discussion with Bridge Meadows of Portland, OR. Initially staff partnered with Bridge Meadows to conduct a Feasibility Study to evaluate the development of two independent housing developments at the Hillsdale Heights property. The land ownership ratio changed the direction of the study and at the end of 2021, Bridge Meadows is exploring the feasibility of developing the site on their own. THA staff and Bridge Meadows will continue these discussions in 2022.

| 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 2021. | 0 units  | 200 units | The Rise – 64 units | In progress         |

| 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<br>Crosspointe – 20 units<br>Cascade Park Vista – 75 units<br>Cascade Park Gardens – 70 units<br>Koz on Market – 52 units | Met                 |

|   |                 |                  |   |                            |
|---|-----------------|------------------|---|----------------------------|
|   |                 |                  | Koz on Puyallup – 64 units<br>MDC Campbell Court – 10 units<br>Bay Terrace – 26 units   |                            |
| <b>HC #5: Increase in Resident Mobility</b>   |                 |                  |   |                            |
| <b>Unit of Measurement</b>  | <b>Baseline</b> | <b>Benchmark</b> | <b>Outcome</b>  | <b>Benchmark Achieved?</b> |
| <b>Number of household able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).</b> | 0 households    | 62 households    | Highland Flats – 11 households<br>Crosspointe – 3 households<br>Cascade Park Vista – 11 households<br>Cascade Park Gardens – 34 households<br>Koz on Market – 15 households<br>Koz on Puyallup – 4 households<br>Campbell Court – 10 households | Met                        |

**Actual Non-Significant Changes:** No non-significant changes or modifications to the MTW activity were made in 2021.

**Actual Changes to Metrics/Data Collection:** No changes were made to the metrics or data collection process. In 2022 THA will review the benchmark and determine if it needs to be adjusted to reflect a multi-year strategy for acquiring the targeted number of units, as new affordable housing development and acquisition takes time.

**Actual Significant Changes:** No significant changes in 2021.

**Challenges in Achieving Benchmarks and Possible Strategies:** There are no challenges related to this activity. Note that HC#1 reflects a multi-year strategy to develop or acquire properties, as this process can be time and labor intensive. THA is seeking every possible avenue to pursue this activity where it is financially feasible and opportunistic to meet THA's core mission.

## 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 the tenant-based voucher program receive a HOP subsidy. A HOP subsidy is a fixed subsidy as opposed to a subsidy based on income. That includes senior/disabled households. Work-able households have a five-year time limit on their assistance. Households experiencing a hardship may apply for a three (3) month extension for an unforeseen loss of income or up to one (1) year to complete a qualifying self-sufficiency activity. Senior/disabled households do not have a time limit. HOP households have annual reexaminations so THA can monitor the earned income and compare it to its other programs. There are no interim exams in this program. THA does not permit port outs for this program except for domestic violence issues covered by VAWA, Reasonable Accommodations or if the receiving PHA will absorb the voucher. 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. An example of the fixed subsidy is below:

| HOP SUBSIDY AMOUNT FY 2021                          |       |       |       |         |         |
|---|-------|-------|-------|---------|---------|
| Voucher Size (Bedrooms)                             | 1     | 2     | 3     | 4       | 5       |
| MTW Subsidy Amount<br>(50% of payment<br>standards) | \$483 | \$633 | \$915 | \$1,111 | \$1,278 |

In 2017, THA implemented a new hardship policy for work-able HOP households. 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%) 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.

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 partnered with the Tacoma Community College (TCC) where THA provides rental assistance to homeless and near homeless students at the community college. 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 given up to an additional 12 months of assistance (not to exceed the five-year limit). The community college handles eligibility and compliance. Participants must be an active student at the community college. Students must remain enrolled and making progress towards a degree or certificate. Since its launch, 143 households have been enrolled in this program. In 2020, THA’s Board of Commissioners approved allowing CHAP voucher holders to transfer to UW Tacoma and maintain their rental assistance.
- **CHOP:** THA partnered with the Department of Social and Health Services (DSHS) 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 as a homeless person. Eligible families that are participating in Family Recovery Court will receive priority for CHOP vouchers.

#### **Impact:**

*HOP and CHAP:* Upon their last year receiving assistance, each HOP cohort has experienced 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. Wages have not kept pace with Tacoma’s rental market – meaning many households exiting HOP will struggle paying their rent without a subsidy. We observe similar challenges with CHAP, as the shallow subsidy does not bolster CHAP household’s income enough to afford housing in the private market. A recent evaluation found that only one-quarter of CHAP participants lease-up and those that do tend to show stronger pre-existing navigational and academic skills.

THA initially made the decision to feature fixed and time-limited subsidies for work-able households at the intention of reaching more households. In some ways THA achieved this, since 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. However, THA completed an assessment in 2021 of HOP participants and found that HOP participants had less positive outcomes than traditional HCV participants whose vouchers were income-based and not time-limited. THA found that HOP participants had lower income increases, lower likelihood to exit under positive circumstances, and lower success rates for leasing up units than

their HCV counterparts. The results were even more evident when examining data by race, as households who were Black, Indigenous, or other People of Color (BIPOC) experienced positive outcomes related to income increases and leasing up when receiving an income-based subsidy like HCV, as opposed to a fixed subsidy like HOP. Please view the full HOP assessment at [Appendix E: Assessment of the Housing Opportunity Program](#). Because of these results, THA is reconsidering current HOP policies that have turned out to be at best, ineffective, and at worst, punitive, particularly the time limitation and fixed subsidy components. At the end of 2021, THA was in public comment and THA anticipates final decisions to be made in 2022 regarding the future program design of HOP and CHAP.

*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:**

At the end of 2021, 428 households were receiving assistance through HOP. Of these households, 257 (60%) were considered work-able and 171 (40%) were elderly and/or disabled households. 60 households were receiving assistance through CHAP and 18 households were enrolled in CHOP. Across all cohorts and HOP programs, 25 households exited in 2021. Of those, 8 households who were work-able exited with a shelter burden at/or less than 50%.

This year, the 2016 work-able HOP cohort reached their five-year end mark. Normally, this cohort would have exited the program after reaching the five-year time limit but, as in 2020, THA has suspended time limits for all time-limited programs as a result of the economic impacts of COVID-19. These terms limits have been extended until the end of 2021. We see a similar upward trend exist among this cohort as with past HOP graduates, as they have higher household incomes on average than the general grouping of all HOP work-able households.

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, as we found in the 2021 HOP assessment referenced in the subsection above. For this reason and the stark outcomes of the HOP assessment, THA is considering changes to the HOP programs that are time-limited and for which the subsidy is fixed. As stated above, the changes should be determined in 2022.

| 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:<br>\$20,670   | HOP All Work-able:<br>\$19,488                             | HOP All Work-able: Not met     |
|  |                 | CHOP: \$20,670<br>CHAP: \$20,670 | 5 <sup>th</sup> -year Work-able:<br>\$21,866 (2016 cohort) | 2016 HOP work-able cohort: Met |
|  |                 |                                  | CHOP: \$13,851<br>CHAP: \$12,898                           | CHOP: Not met<br>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 | 129 households | 107                | Not Met             |
|   | 0%           | 50%            | 42%                | Not met             |
| 2) Employed Part Time   | 0 households | 116 households | 56                 | Not Met             |
|   | 0%           | 45%            | 22%                | Not Met             |
| 3) Enrolled in an Educational Program   | 0 households | TBD            | 60 CHAP households | In Progress         |
|   | 0%           | TBD            | NA                 | NA                  |
| 4) Enrolled in a Job Training Program   | 0 households | TBD            | NA                 | In Progress         |
|   | 0%           | TBD            | NA                 | NA                  |
| 5) Unemployed   | 0 households | 13 households  | 94                 | Not met             |
|   | 0%           | 5%             | 37%                | Not met             |



| SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) |   |  |   |                     |
|---|---|--|---|---------------------|
| Unit of Measurement   | Baseline  | Benchmark                              | Outcome   | Benchmark Achieved? |
| <b>Number of households receiving TANF (decrease).</b>                        | 15% (9) work-able HOP households from 2013 cohort | 10% of year 5 work-able HOP households | Year 5 work-able HOP households: 1 receiving TANF (3% of work-able HOP households from 2016 cohort) | Met                 |

| SS #5: Households Assisted by Services that Increase Self Sufficiency  |              |  |   |                     |
|--|--------------|--|---|---------------------|
| Unit of Measurement  | Baseline     | Benchmark  | Outcome   | Benchmark Achieved? |
| <b>Number of households receiving services aimed to increase self-sufficiency (increase). Households participating in FSS.</b> | 0 households | 15% participation in FSS by HOP work-able households | 29 HOP households participated in FSS (16% of work-able HOP households) | Met                 |

| CE#6: Reducing per Unit Subsidy Costs for Participating Households   |   |   |  |                     |
|--|---|---|--|---------------------|
| Unit of Measurement  | Baseline                                      | Benchmark   | Outcome  | Benchmark Achieved? |
| <b>Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).</b> | \$604 average monthly HAP for traditional HCV | \$708 average monthly HAP for HOP households (50% of 2-BD payment standard) | \$568 average monthly HAP for HOP-Elderly/Disabled households;<br><br>\$705 for HOP work-able households | Met                 |

| SS #8: Households Transitioned to Self Sufficiency  |   |  |   |                     |
|---|---|--|---|---------------------|
| Unit of Measurement   | Baseline  | Benchmark  | Outcome   | Benchmark Achieved? |
| <b>Number of households transitioned to self-sufficiency (increase).</b><br><b>Work-able households who exit HOP with a market rent burden less than or equal to 50%.</b> | Exited with market rent burden <=50%: NA<br><br>Average market rent burden (all HOP): 72%<br><br>Average market rent burden (HOP 2013 co-hort): 71% | 50% of exiting work-able households will have market rent burden <=50% | Exited with market rent burden <=50%: 8 families (62% of total work-able HOP households)<br><br>Average market rent burden (all HOP): 69%<br><br>Average market rent burden (HOP 2016 co-hort): 60% | Met                 |

| HC #3: Decrease in Wait List Time                                |            |           |  |                     |
|--|------------|-----------|--|---------------------|
| Unit of Measurement  | Baseline   | Benchmark | Outcome  | Benchmark Achieved? |
| <b>Average applicant time on wait list in months (decrease).</b> | 5.16 Years | 2 Years   | THA did not issue new HOP vouchers in 2021, except for households exercising choice mobility who were already residing in THA's portfolio units with PBVs. | N/A                 |

| CE # 1: Agency Cost Savings  |  |  |  |                     |
|--|--|--|--|---------------------|
| Unit of Measurement  | Baseline   | Benchmark                              | Outcome  | Benchmark Achieved? |
| <b>Total cost of calculating rent in dollars (decrease). Estimated staff cost to conduct annual reviews.</b> | \$59,127 (cost to complete the same # of traditional annual recertification) | \$29,563 (decrease by 50% of baseline) | \$9,641 estimated staff cost to conduct HOP reviews in 2021. | Met                 |

| CE # 2: Staff Time Savings   |   |                             |  |                     |
|--|---|-----------------------------|--|---------------------|
| Unit of Measurement  | Baseline  | Benchmark                   | Outcome  | Benchmark Achieved? |
| <b>Total time to calculate rent in staff hours (decrease). Staff time to conduct annual reviews.</b> | 1,572 hours (time to complete the same # of traditional annual recertification) | 786 hours (50% of baseline) | 327 staff hours spent conducting HOP reviews in 2021 | Met                 |

| CE # 4: Increase in Resources Leveraged (From the College Housing Assistance Program) |          |           |   |                     |
|---|----------|-----------|---|---------------------|
| Unit of Measurement   | Baseline | Benchmark | Outcome   | Benchmark Achieved? |
| <b>Amount of funds leveraged in dollars (increased).</b>                              | \$0      | \$22,000  | <ul style="list-style-type: none"> <li>• Kresge Foundation: \$500,000 to support CHAP – subsidies, data, evaluation, landlord mitigation funds and operating funds.</li> <li>• ECMC Foundation: \$10,000 landlord mitigation/operating funds</li> <li>• Rapoport Foundation \$65,000 for CHAP-DOC</li> <li>• Foundation for Tacoma Students \$50,000</li> </ul> | Met                 |

|  |  |  |  |  |
|--|--|--|--|--|
|  |  |  | support for CHAP<br>project manager (ended<br>June 30, 2021)<br>• Bill and Melinda Gates<br>Foundation \$45,000 for<br>contract compliance and<br>management |  |
|--|--|--|--|--|

**Hardships:** 65 HOP households received a hardship extension under COVID-19 waivers.

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:** In response to the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Defer end of participation dates:** THA will delay the end of participation for households when due to program time limits for a specified period of time as determined by the circumstances and need of the agency during a state of emergency.

**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 2021. However, with the results of the HOP evaluation please note we anticipate programmatic changes to be made in 2022.

**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 economic mobility. However, meaningful gains in a short period of time are difficult to achieve. For SS#3, THA initiated a process that sought to track the number of households enrolled in an educational and/or job training program for this population; however, THA has experienced limitations with its administrative data system. THA will transition to a new vendor in 2022-2023 that will better serve our data needs. As we begin the data system transition, THA will review its capabilities to determine the relevance and viability of reporting on these measures continuously.

## 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 2021, 519 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 | 519 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 2021.

**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 2021 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 2021, FSS served 153 families. 13 families graduated from the FSS program with an average escrow amount of \$6,805. This is a decrease of \$488 from 2020 for the average escrow amount. In 2021, FSS participants continued their work with the embedded financial coach and 22 participants saw an average increase in their credit score by 54 points. 17 participants grew their net worth by an average of \$10,405. Five of these participants went from a negative or zero net worth. Two of the 13 graduates purchased homes, utilizing escrow funds for down payments, relocation costs and furnishing their new homes. This number dropped from 2020 as it reflects the tight housing market which is driving up home prices.

| 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 (decrease) by not having escrow errors. | 936 hours | 78 hours  | 0 hours | 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). | \$9,231  | \$21,060  | \$11,724 | Not 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     | \$1,602 | 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   | 83 households | 54 households | 85 households  | Met                 |
|   | 54%           | 35%           | 56%            | Met                 |
| 2) Employed Part Time   | 28 households | 61 households | 35 households  | Not met             |
|   | 18%           | 40%           | 23%            | Not met             |
| 3) Enrolled in an Educational Program   | 20 households | 38 households | 32 households  | Not met             |
|   | 13%           | 25%           | 21%            | Not met             |
| 4) Enrolled in a Job Training Program   | 35 households | 31 households | 27 households  | Not met             |
|   | 23%           | 20%           | 18%            | Not met             |
| 5) Unemployed   | 40 households | 8 households  | 102 households | Not met             |
|   | 26%           | 5%            | 67%            | 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 | 22 participants or 14% 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 | 159 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) | \$728   | Not 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) | \$504 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).<br>Percentage of FSS graduates with market rent burden less than 50%. | Exited or graduated FSS with market rent burden <=50%: NA<br><br>Average market rent burden (all FSS): NA | 50% of exiting or graduating work-able households will have market rent burden <=50% | Exited or graduated FSS with market rent burden <=50%: 100% (4 families) of FSS EOPs in 2021<br><br>Average market rent burden (FSS participants with earned income above \$0): 58% | Met                 |

**Actual Non-Significant Changes:** No changes or modifications were made to the MTW activity in 2021. However, THA initiated discussions with stakeholders to explore changes to its FSS program that may impact its program eligibility, length of its Contract of Participation, pay points, and types of services rendered by FSS staff in the future. We expect these changes to be determined between 2022-2023.

**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 2021.

**Challenges in Achieving Benchmarks and Possible Strategies:** There have been challenges achieving the prescribed benchmarks as the expensive housing market, increase in living expenses, and employment impact as a result of COVID-19 have only exacerbated these difficulties. In response, THA is currently exploring a possible FSS design to better meet the needs of clients and overcome programmatic barriers to graduation. We expect these changes to be determined between 2022-2023.

## 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:** The program is aimed at developing a savings habit among students and their families and improving academic achievement, graduation rates, college preparation and enrollment. New Salishan is THA's largest community. It is a HOPE VI redevelopment that created a mixed-income community of 1,350 renter and homeowner households on an award-winning design.

At the start of 2021 THA's CSA Program contained following elements, however, it should be noted the program shifted mid-year as described in the Activity update.

*Elementary School Stage:* When a Salishan student enrolls in elementary school, THA will open a savings account in his or her name. THA will remain the account custodian. THA will make an initial \$50 deposit into the account. THA will match the family's deposit into the account up to \$400 per year. This match will continue through 5<sup>th</sup> grade.

*Middle School through High School Stage:* When students reach 6<sup>th</sup> grade the match stops. Instead, the student and a counselor will devise a plan with milestones from then until high school graduation and enrollment in college. *E.g.:* improved attendance; improved Grade Point Average; enrolling in the College Bound Scholarship Program; taking the PSAT, SAT and ACT; taking college preparatory courses; applying to college; filling out the FAFSA; 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.

**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 more than 205 students and has partnered with the state's 529 program to expand college-savings capabilities to low-income families.

**Update:** THA adjusted the program in 2021 such that when a THA student opens a GET account, THA will set aside \$500 for that student to earn into their GET account upon program completion. Previously, the CSA offered a two-phased earning model that included a seed and match for K-5th grade students and shifted to an academic-incentive earning structure for 6-12<sup>th</sup> grade students. The CSA has been redesigned to a simple flat-amount earning model of \$500, which will be applied to new CSA enrollees in 2021. Students who joined the program prior to 2021 will be grandfathered in to earn \$2,200 upon high school graduation, as well as any dollars previously earned through the K-5th grade seed and match.

Since its launch, the program has enrolled more than 205 students, brought financial education to 1,425 students and has managed to partner with the state's 529 program to expand college-savings capabilities to low-income families.

| 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 | \$500 average account balance | Met                 |

**Actual Non-Significant Changes:** THA adjusted the program in 2021 which includes different criteria for program eligibility, rules for earning CSA dollars, and outlines how participants can maximize the earnings available through THA.

**Actual Changes to Metrics/Data Collection:** THA anticipates modifications to the baselines or benchmarks during the plan year and will update the metrics when the data becomes available. Modifications to program benchmarks will consider the impacts of the program expansion to additional THA family properties and rates of family engagement with financial and post-secondary navigation learning opportunities. Data will be collected through the GET program and shared with THA.

**Actual Significant Changes:** No significant changes were made to this MTW activity in 2021.

**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     | In Progress          |
| SS#3 Number of households enrolled in an educational program (receiving financial aid) as a % | 0%                    | 5% (increase from baseline) | TBD     | In Progress          |

**Update:** THA has updated its processes and began implementing this policy in 2020. THA has biennial and triennial recertification cycles and would likely see the full impact of this activity after one full recertification cycle. As explained in the *Actual Changes to Metrics/Data Collection* section, THA cannot report on interim outcomes for 2021 due to limitations within our administrative data system that we are in the process of resolving with a data system transition.

**Actual Non-Significant Changes:** No changes or modifications to the MTW activity were made in 2021.

**Actual Changes to Metrics/Data Collection:** THA initiated a process that sought to track the number of households enrolled in an educational program and received financial aid; however, THA has experienced limitations with its administrative data system. THA will transition to a new

vendor in 2022-2023 that will better serve our data needs. As we begin the data system transition, THA will review its capabilities to determine the relevance and viability of reporting on these measures continuously.

**Actual Significant Changes:** No significant changes were made to this MTW activity in 2021 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 ensures that families could afford to move into the unit when they come to the top of the waiting list. 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 and utilization of its 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.

THA's landlord engagement specialist was able to successfully partner with participating landlords to develop a "Renter Readiness" course and certification. Landlords will reduce screening criteria for THA households that have successfully completed the course. Due to COVID-19, this course has been moved entirely online and has been met with great reviews.

**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 and 2021, THA was unable to offer security deposit assistance for voucher holders due to lack of funding. However, THA secured funds to operationalize this program again in 2022.

Renters Readiness Certification continues to be well utilized. In 2021, 258 community members participated in virtual Renters Readiness Certification classes with 40 of those completing all three classes and getting a certificate. Beginning in 2020 and in continuation throughout the COVID-19 pandemic, the Landlord Advisory Group quickly became a space to share resources and collectively problem-solve issues facing the industry. For example, 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 their lack of access to federal resources. In these advisory group meetings landlord partners discussed setting up payment plans and the ability to reduce the amount of rent owed to tenants. They also discussed key strategies for 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.

Finally, members of THA's Landlord Advisory Group started planning a landlord education program that launched in 2021. The City of Tacoma, Landlord Tenant and Fair Housing Coordinator are involved in the planning process. As a result, THA conducted trainings and outreach to educate landlords about changes to local and state laws and to connect them to resources to help with rent delinquencies. Please note 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 | 40 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     | In progress         |

**Actual Non-Significant Changes:** No changes or modifications to the MTW activity were made in 2021.

**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 2021.

**Challenges in Achieving Benchmarks and Possible Strategies:** While there are no outcomes to report this year for CE#4, we expect this figure to increase in upcoming reporting years since THA's Security Deposit Assistance Program will resume in 2022.

## 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:** Following 2020, a year in which inspection operations were severely impacted by the pandemic, THA began to resume inspections in 2021 and make progress on the backlog. In 2021, we conducted more than 3,000 inspections including facilitating owner self-certifications of over 700 units. THA utilized remote capabilities such as virtual inspections and receiving documentation and paperwork online. THA is developing clearer guidelines to landlords and staff regarding the allowance of landlords to provide evidence (outside of physical re-inspection) that fail items, which are outside of THA's prescribed 'life-threatening' category, have been cured. It should be noted that THA 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.

| CE # 1 (a): Agency Cost Savings – Staff Costs                         |   |   |           |                     |
|---|---|---|-----------|---------------------|
| Unit of Measurement   | Baseline  | Benchmark                               | Outcome   | Benchmark Achieved? |
| <b>Decrease total cost of task measured by staff time (decrease).</b> | Total cost of initial re-inspections (TBD) (in dollars) | 20% decrease from baseline (in dollars) | 200 hours | In progress         |

| CE # 1 (b): Agency Cost Savings – Staff Time Savings                  |  |                                       |         |                     |
|---|--|---------------------------------------|---------|---------------------|
| Unit of Measurement   | Baseline   | Benchmark                             | Outcome | Benchmark Achieved? |
| <b>Decrease total cost of task measured by staff time (decrease).</b> | Average time to conduct initial inspections x number of initial re-inspections (TBD) | 20% decrease from baseline (in hours) | \$5,995 | In progress         |

**Actual Non-Significant Changes:** No changes or modifications to the MTW activity were made in 2021.

**Actual Changes to Metrics/Data Collection:** Given capacity limitations due to COVID-19 that severely impacted our inspection schedule and methods for in-person inspection, THA is reviewing its data and will establish a new baseline and benchmark that that is appropriate for 2021 forward.

**Actual Significant Changes:**

**Emergency Operations:** During the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants, and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Defer HQS Inspections:** Inspections require in-home visits and can require more than one trip to a single residence. During a time of crisis, we deferred regular and quality control HQS inspections to the household's next scheduled inspection date. THA may accept a landlord's self-certification that the unit meets HQS or putting off these inspections until we have recovered from the crisis or until the next regular inspection is due, whichever is sooner. For quality assurance (QA) purposes and to retain program integrity, THA would increase its QA inspections and run targeted inspections on units with past of frequent HQS deficiencies.

**Challenges in Achieving Benchmarks and Possible Strategies:** There are no challenges related to this activity.

# 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 work-able 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 as 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

In accordance with the requirements of this report, THA has submitted our unaudited information in the prescribed FDS file format through the Financial Assessment System – PHA. The audited FDS will be submitted by September 30, 2022.

### 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 focusing on housing, employment-related services, and other case management activities that will help families achieve their individual goals. Its Client Support and Empowerment Department also assists tenants with housing stability services.
- THA is entering into community partnerships to form new programs and wraparound services, such as the 2Gen program, which utilizes cross-sector partnerships like the YMCA, KBTC and the Health Department to provide multi-generational mentorship programs, tutoring, social emotional learning.
- THA is in the midst of making necessary technological enhancements that will benefit the organization and the residents. This includes investments in THA's administrative data system as THA seeks to transition to a new vendor in 2022-2023. THA is also making investments to ensure data is aligned in our reporting and visualization capabilities to provide meaningful insight into THA's quality of housing and services.
- 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 utilizes its single source MTW funds to obtain land, in addition to existing properties, which is vital for future development of affordable housing in Tacoma.
- 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.

| 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

Washington State auditors completed an accountability audit of THA in November 2021 for which there were no findings.

External stakeholders (funders and investors) completed accountability audits of several THA properties throughout 2021 for which there were minor findings and all corrections were acceptable in the following properties:

- Bay Terrace Phase II
- Arlington
- The Rise
- Renew Tacoma

THA compliance staff commenced systematic internal audits in 2021 to ensure programmatic compliance for household income, supporting documentation, household composition, and other eligibility criteria.

This included compliance audits for the following properties and programs:

- The Arlington and the Rise properties in THA's portfolio
- Audits for THA's 3rd party managed properties
- Audits for Tax Credit properties.
- Audits for seven of THA's Property Based Subsidy properties

# 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 Fiscal Year 2021. This is certification that the agency has met the three 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 2021, 92% of all households were at or below 50% AMI.

| Certification of Statutory Compliance 2011 |                   |               | Certification of Statutory Compliance 2021 |                   |               |
|--|-------------------|---------------|--|-------------------|---------------|
| 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  | 89%               | 11%           |
| 3  | 92%               | 8%            | 3  | 86%               | 14%           |
| 4  | 93%               | 7%            | 4  | 88%               | 12%           |
| 5  | 93%               | 7%            | 5  | 84%               | 16%           |
| 6  | 96%               | 4%            | 6  | 85%               | 15%           |
| 7  | 97%               | 3%            | 7  | 91%               | 9%            |
| 8+   | 93%               | 7%            | 8+   | 80%               | 20%           |

- 2) Continuing to assist substantially the same total number of eligible low-income families who 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 <sup>i</sup>   | 3,696 <sup>ii</sup> | 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 <sup>iii</sup> | 4,054               | 467 <sup>iv</sup>     | 4,764  |
| 2020 Households Served                | 4                  | 4,134               | 509                   | 4,647  |
| 2021 Households Served                | 5                  | 4,126               | 545                   | 4,676  |

<sup>i</sup> 104 units public housing were torn down at Bay Terrace in 2013.

<sup>ii</sup> THA received 103 TPV vouchers between July and October 2012.

<sup>iii</sup> In November 2019 THA converted 324 public housing units to RAD-PBVs.

<sup>iv</sup> 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.

- 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%  |
| 2021                 | 50% | 19% | 13% | 7%  | 6% | 2% | 2% | 100%  |

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April Black

Executive Director

## MTW Energy Performance Contract (EPC) Flexibility Data

This section does not apply.

# Additional Appendix Items

Appendix A: Local Asset Management Plan

Appendix B: Methodology

Appendix C: THA's Strategic Objectives

Appendix D: THA's Emergency Operations

Appendix E: Assessment of the Housing  
Opportunity Program

# Appendix A: 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 2021 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/Bay Terrace properties which comprises 5 properties and 270 units is also considered under our Portfolio West umbrella, as is our Arlington Youth Housing property (58 units). As these properties are 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 transitioned to a Portfolio Manager that that oversees both of our portfolios in 2020.

### ***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 were 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                            |  |
|                     | PILOT                                      |  |
|                     | Debt Service Payments                      |  |
|                     | Audit Costs                                |  |
| Rental Assistance   | 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. 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         |
| <b>Total Fee:</b>                     | <b>\$21.50</b>    | <b>\$47.00</b> |

**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 2021

### Program Support Center Allocation Detail

Table 3: Total units & Program Support unit equivalencies

| Program Support Center Unit Equivalencies - 2021 Projected |                               |                           |                                  |   |             |
|--|-------------------------------|---------------------------|----------------------------------|---|-------------|
| Cost Center  | Funding Source                | CAH (MTW) Unit Equivalent | Tax Credit (MTW) Unit Equivalent | Business Activities (Non-MTW) Unit Equivalent | Total Units |
| Rental Assistance  | Mod Rehab SR0003              |                           |                                  | 30  | 30          |
|  | Mod Rehab SR0002              |                           |                                  | 41  | 41          |
|  | Section 8 Vouchers            | 3,543                     |                                  |   | 3,543       |
|  | Life Manor TPV                | 150                       |                                  |   | 150         |
|  | Hillside Terrace TPV          | 103                       |                                  |   | 103         |
|  | Wedgewood TPV                 | 48                        |                                  |   | 48          |
|  | Tahoma House TPV              | 5                         |                                  |   | 5           |
|  | FUP Vouchers                  |                           |                                  | 125   | 125         |
|  | Mainstream Vouchers           |                           |                                  | 78  | 78          |
|  | NHT Vouchers                  |                           |                                  | 100   | 100         |
|  | VASH Vouchers                 |                           |                                  | 217   | 217         |
| Rental Assistance: RAD Vouchers                            | RTH RAD Vouchers              | 456                       |                                  |   | Prop Mgt    |
|  | Bay Terrace 1 RAD Vouchers    | 26                        |                                  |   | Prop Mgt    |
|  | Hillside Terrace RAD Vouchers | 33                        |                                  |   | Prop Mgt    |
|  | Salishan RAD units            | 290                       |                                  |   | Prop Mgt    |
| Property Management: Tax Credit Partnerships               | Hillside Terrace 1-2          |                           | 46                               |   | 46          |
|  | Hillside Terrace 1500 Blk     |                           | 16                               |   | 16          |
|  | Bay Terrace                   |                           | 70                               |   | 70          |
|  | Bay Terrace 2                 |                           | 74                               |   | 74          |
|  | Renew Tacoma Housing          |                           | 456                              |   | 456         |
|  | Arlington Youth Housing       |                           | 58                               |   | 58          |
|  | Court F (Rise at 19th)        |                           | 64                               |   | 64          |
|  | Salishan 1                    |                           | 90                               |   | 90          |
|  | Salishan 2                    |                           | 90                               |   | 90          |
|  | Salishan 3                    |                           | 90                               |   | 90          |
|  | Salishan 4                    |                           | 90                               |   | 90          |
|  | Salishan 5                    |                           | 90                               |   | 90          |
|  | Salishan 6                    |                           | 90                               |   | 90          |
| Property Management: Local Fund Units                      | Salishan 7                    |                           |                                  | 91  | 91          |
|  |                               |                           |                                  |   |             |
| 3rd Party Managed - 50 % equivalency                       | Highland Crest -              |                           |                                  | 36.5  | 73          |
|  | James Center North            |                           |                                  | 15  | 30          |
|  | New Look                      |                           | 24                               |   | 48          |
|  |                               |                           |                                  |   |             |



# 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.

# Appendix D: THA's Emergency Operations

During the COVID-19 pandemic, THA wanted to account for temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants, and the general public. As a result of the pandemic and the state and local emergency declaration, THA temporarily utilized the following activities in 2021:

- **Deferred end of participation dates:** Under normal circumstances, when a family reaches the end of their program term they are no longer eligible for assistance. This would allow us to continue to provide assistance to families who would have their assistance terminated for non-violation related reasons during a time of crisis.
  - *Related Activities: 3. Local Project-Based Voucher Program; 17. Housing Opportunity Program*
- **Extended Regular Recertification Due Dates:** A recertification is due on a regular schedule. During a recertification, we need to collect and verify household and income information to make sure households are still eligible for housing. In rare instances when needed, THA pushed back recertifications by one year that were due during a time of crisis.
  - *Related Activities: 5. Local Policies for Fixed-Income Households; 6. Local Policies for Work-Able Households*
- **Emergency Verification Policies:** At the time of a recertification and initial eligibility determination, we must verify income information. This means that people have to give us hard copies of their paychecks, benefit letters, etc. As we see with COVID, it can be difficult to get this information as well as submit this information. We utilized this flexibility to make income verification easier for everyone by accepting self-certifications over the phone, by e-mail or other means.
  - *Related Activities: 5. Local Policies for Fixed-Income Households; 6. Local Policies for Work-Able Households; 7. Local Income and Asset Verification Policy; 8. Local Interim Processing and Verification Policies (HCV/PH)*

- **Removed 90-day and 20% rule for Interims:** For households with a Section 8 voucher, their rent is based on their income. During normal operations, we only process an interim (change in their rent) if they have lost at least 20% of their household income and that decrease is expected to last more than 90-days. We propose to remove those requirements so that families can find relief during a crisis.
  - *Related Activity: 8. Local Interim Processing and Verification Policies (HCV/PH)*
- **Deferred HQS Inspections:** Inspections require in-home visits and can require more than one trip to a single residence. During a time of crisis when needed, we would defer regular and quality control HQS inspections to the household's next scheduled inspection date. This means that THA may accept a landlord's self-certification that the unit meets HQS or putting off these inspections until we have recovered from the crisis or until the next regular inspection is due, whichever is sooner. For quality assurance (QA) purposes and to retain program integrity, THA would increase its QA inspections and run targeted inspections on units with past of frequent HQS deficiencies.
  - *Related Activity: 25. Modify HQS*

# Appendix E. Assessment of the Housing Opportunity Program

December 2021

## EXECUTIVE SUMMARY

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Over the course of 2021, the Department of Policy, Innovation, and Evaluation (PIE) has been investigating the efficacy and impacts of three time-limited, flat subsidy programs, which were created using THA's Moving to Work (MTW) flexibility. They include: the Housing Opportunity Program (HOP), Child Housing Opportunity Program (CHOP), and College Housing Assistance Program (CHAP). This report summarizes the available evidence on the programs' efficacy, before and during 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 was used as a comparison group.

### ***Leasing***

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Overall, HCV households showed greater success securing housing than HOP households (82% compared to 64%). Though changes in the rental market have led to lower lease up rates for participants in both programs, HCV households have generally maintained greater lease up rates. However, extremely low-income households (those earning 30% of the area median income or less) with a HOP voucher were twice as likely to be unsuccessful in securing a unit as extremely low-income households with a traditional voucher subsidy.

When comparing lease up outcomes by program and race/ethnicity, rates were somewhat similar for white and Black, Indigenous, and people of color (BIPOC) headed households. Yet, BIPOC households participating in CHAP and CHOP were less successful at securing housing than white households. Additionally, as the market has become more competitive over time, BIPOC households using a HOP voucher have increasingly been unsuccessful at leasing up compared to white shoppers.

## ***Income***

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HCV households (work-able and elderly/disabled) were more likely to experience an increase in income (67% of the total population) than HOP households (54%) between the time they entered the program and exited. A narrower analysis of work-able households housed in 2012-2014 and exited in 2018-2020, found that 85% of HCV households increased their income compared to just 60% of HOP households. The average HCV household's income increased nearly 200% while HOP household's income only increased by 33%.

BIPOC households that received an income-based subsidy were more likely to experience an increase in income than any other population. Conversely, BIPOC households were less likely to experience an increase in income if they were participating in CHAP or CHOP.

## ***Program Exits***

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PIE staff reviewed the account notes of a random sampling of 50% (n=120) of HOP and HCV households that exited between 2018 and 2020 to determine the circumstances of clients' exits. The likelihood of HCV households exiting under positive circumstances is double that of HOP households. Based on the sample of households, HCV households have the highest proportion of positive exits and the lowest proportion of negative exits. Only 20% of HOP households exit due to reaching the 5-year time limit. Achieving self-sufficiency (reaching >80% AMI) appears to be as common as eviction or death. Conversely, self-sufficiency is the third most common reason for program exit for HCV households.

## ***Rent Burden***

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Despite HOP households having a higher income than HCV households at entry, severe rent burdens (>50% of income goes to housing expenses) are almost twice as likely while on HOP than HCV. CHAP and CHOP households face greater current rent burdens than clients on other programs.

HOP households are more likely to exit with a severe market rent burden than HCV households (77% compared to 60%). Further, households headed by BIPOC women (who make up the largest portion, roughly 50%, of THA's voucher holders), are twice as likely to exit with no market rent burden from the HCV program than from HOP (18% compared to 9%). Across all groups, HCV households have lower rates of experiencing a severe market rent burden upon exit.

## ***Racial Equity Impact***

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Across nearly all demographic groups, households experience increased success on the Housing Choice Voucher. Most significantly, the disparities that are observed in the HOP program are often reduced, if not entirely reversed, when compared to the HCV population. For instance, while both BIPOC and white households have greater lease up success on HCV, the disparity in lease up rates is half what it is on HOP (a difference of 3 percentage points compared to 7 percentage points).



## ***Recommendations***

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The data leads the PIE department to recommend moving HOP households to the tiered income-based subsidy model used for HCV. This change would benefit two thirds of current HOP households, increasing their housing assistance payment by \$211/month (\$200 median increase). Those that experience a reduction in their rental assistance will pay an average of \$166 more/month (\$123 median decrease).

Additionally, we recommend eliminating the time limit on assistance while maintaining administrative efficiencies that have worked well for HOP.

## INTRODUCTION

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In June 2020, in response to the COVID-19 pandemic and its subsequent economic impacts, the Tacoma Housing Authority (THA) suspended time limits through the end of 2020 for its four time-limited, tenant-based rental assistance programs. As the pandemic continued to take its toll on the local community, the agency decided to extend this moratorium through 2021. Throughout this same time, the Department of Policy, Innovation, and Evaluation (PIE) has been investigating the efficacy and impacts of three of these time-limited, flat subsidy programs, which were created using THA's Moving to Work (MTW) flexibility. They include: the Housing Opportunity Program (HOP), Child Housing Opportunity Program (CHOP), and College Housing Assistance Program (CHAP). This report summarizes the available evidence on the programs' efficacy, before and during 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?*
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4. *Rent Burden: What level of market rent burden does a HOP household face at exit?*

The general Housing Choice Voucher (HCV) population was used as a comparison group when data was available.<sup>5</sup>

Following this analysis, PIE provides recommendations for program changes that aim to increase household stability and positive housing outcomes. The recommendations in this report will address the HOP program more generally, with specific CHAP and CHOP program recommendations presented separately in the appendices. First, PIE situates this investigation within the background and context within which the program operates.

## BACKGROUND AND CONTEXT

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### ***The Development of the HOP Subsidy***

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The HOP subsidy model was developed in 2013 with the intent to serve more households with a slightly shallower subsidy. At that time, THA was facing budget constraints. Many housing authorities were freezing vouchers, but THA wanted to find a way to continue to serve our households and serve more households with less.

To accomplish this goal, THA went from offering an income-based subsidy to a fixed subsidy model. The HOP subsidy would cover 50% of the payment standard, leaving the household to cover the remaining rent portion. Traditional Housing Choice Vouchers (previously known as Section 8 vouchers) limited a

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<sup>5</sup> The HCV comparison population was smaller than the HOP population as data on households who entered before 2012 was not readily available. The work-able HCV population was small, limiting PIE's ability to draw conclusions about disaggregated data, especially when disaggregated by race.

household's share of rent to 30% of their monthly income. The housing authority would cover the remaining rent balance.

The aim of the HOP subsidy model is to “thin the soup” and serve more households in return. At the onset of the program, it was estimated that the average household on HOP would spend roughly 34% of their income on rent – slightly above those on the traditional voucher program (which aims for around 30%), but not so much as to cause a significant rent burden.

The flat subsidy is also a way to lessen any confusion for households, landlords, and staff by simplifying the subsidy amount. Landlords and tenants are not subject to fluctuations in THA's payments as a household's income changes. Households know exactly how much THA would contribute to their rent amount once they were accepted to the program. The households can determine for themselves how much they could afford with THA's assistance already set and defined. The fixed subsidy also allows households to increase their income without having to face an increase in their portion of the rent payment. However, it also means they are responsible for their portion of the rent if they lose income.

Additionally, since the subsidy is fixed based on household size at entry, it also meant that clients do not have to undergo the standard annual recertification and verification of income. Recertifications on HOP are less invasive and require less documentation than the traditional voucher – saving time for both the client and THA staff.

Further, households that are work-able (not elderly or disabled) have a five-year time limit on the program. The time limit is intended to serve two purposes: 1) motivate households to increase their earnings in preparation for the end of their housing assistance, and 2) limit the time on assistance to create more frequent turnover so that households on the waitlist get a turn at receiving rental assistance.

The model has been expanded to serve two populations in addition to new HCV households: community college students experiencing housing insecurity and homelessness and families and foster youth involved in the family court system.

## Housing Opportunity Program

### Fixed Subsidy

THA pays 50% of the payment standard.  
The household pays the **remaining housing costs**.

### Voucher Size

Based on 2 people per bedroom.  
Adjusted if household size **decreases**.  
Does not adjust if household size increases.

### Time Limit

No time limit for **elderly/disabled** households.  
5-year limit for **work-able** households.

### Utility Allowance

None.

### Changes in Income

The subsidy amount **will not change** if a household's income changes.

## Housing Choice Voucher

### Income-based Assistance

The household pays **~30% of income** on rent.  
THA pays the remaining housing costs.

### Voucher Size

Based on 2 people per bedroom.  
Adjusted if a household size **decreases OR increases**.

### Time Limit

No time limit for **all** households.

### Utility Allowance

Factored into subsidy.

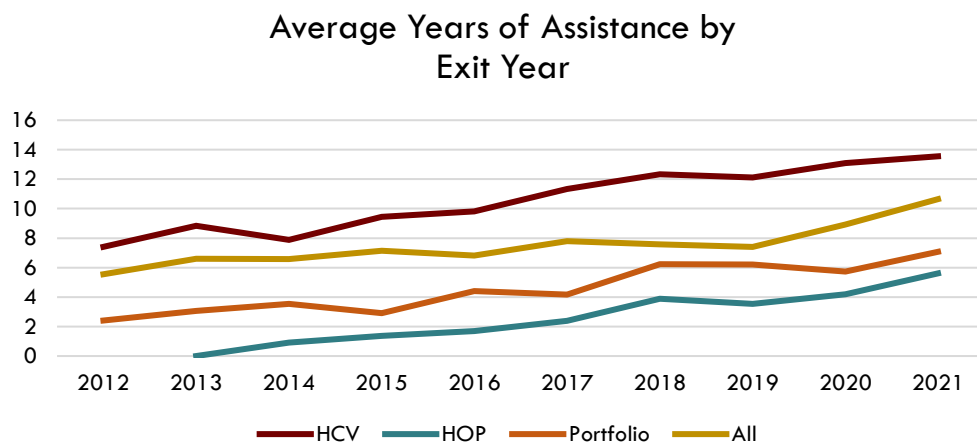
### Changes in Income

When income increases, the subsidy amount decreases at the household's next re-certification (every 2-3 years).

The subsidy will increase if there is a loss of income.

## The HOP Subsidy Today

Since the program was developed in 2013, Tacoma's housing market has become increasingly out of reach for low-income households. A low vacancy rate, in-migration of higher wage earners, and gentrification are driving this trend. Meanwhile, wages among low-income workers have not kept pace with these growing housing costs. Between 2016 and 2019, the median rent in Tacoma increased by 21% while median renter income increased by just 12%.<sup>6</sup> The National Low Income Housing Coalition reported that a minimum wage worker in Pierce County had to work 80 hours a week to afford the fair market rent for a two-bedroom unit in 2020. The impact of these changes can be seen in the following chart. Across both the HOP and HCV voucher programs and the THA portfolio, time on assistance has increased across the board for work-able households.



Specifically, in recent years, exiting HCV households received assistance 30% longer than they were prior to 2018. Portfolio tenants at our family properties remained in their units for nearly twice as long as tenants that exited in previous years. The increased time on HOP, shown in the chart on the following page, is to be expected as the program was being implemented and enforcement of the time limit has been halted during COVID. While the average time is different between programs (and a worthwhile topic for future exploration), the overall trend across programs stresses the importance of how local market conditions and access to unsubsidized affordable housing impact length of assistance.

This situation has only been exacerbated by the COVID-19 pandemic. According to Opportunity Insights, employment rates among Pierce County workers in the bottom wage quartile decreased by 33.3% between January and April 2020.<sup>7</sup> As of December 2020, nearly a quarter of renter households making

<sup>6</sup> Root Policy Research, 2020. [https://www.cityoftacoma.org/UserFiles/Servers/Server\\_6/File/cms/Planning/Affordable%20Housing/AHAS%20Planning%20Actions/D2%20Packet%20-%20Home%20In%20Tacoma%20Project%20\(11-18-20\).pdf](https://www.cityoftacoma.org/UserFiles/Servers/Server_6/File/cms/Planning/Affordable%20Housing/AHAS%20Planning%20Actions/D2%20Packet%20-%20Home%20In%20Tacoma%20Project%20(11-18-20).pdf)

<sup>7</sup> Opportunity Insights, 2021. <https://www.tracktherecovery.org/>

less than \$25,000/year reported being behind on their rent.<sup>8</sup> Fortunately, government has stepped in to respond to the economic devastation wrought by the pandemic. State and national government instituted eviction moratoria. Congress passed a series of emergency relief bills culminating most recently in the American Rescue Plan Act, which provides a historic investment in new federal housing resources. Finally, the new administration is contemplating universal voucher coverage for qualifying households. Currently, only about a quarter of households who qualify for housing assistance receive it.

A challenging economic outlook for low-income renters in combination with new and deep investment in housing resources require THA take a renewed look at the HOP subsidy model. In addition, eviction moratoria are expiring, allowing landlords to increase rents and bring legal action if renters cannot keep up with the cost of housing and do not qualify for or have exhausted their assistance<sup>9</sup>. HOP households will shoulder 100% of the rent increases whereas HCV households would continue to pay an affordable rent based on their income. This challenging situation adds urgency to this issue.

The following sections look at how current and past HOP participants fare compared to the HCV population. The analysis focuses on four main areas: lease up success, changes in income while on THA assistance, circumstances around program exit, and rent burden at exit. Following the analysis, the final sections detail which demographic groups most benefit from HOP and the financial impacts of eliminating the flat subsidy model.

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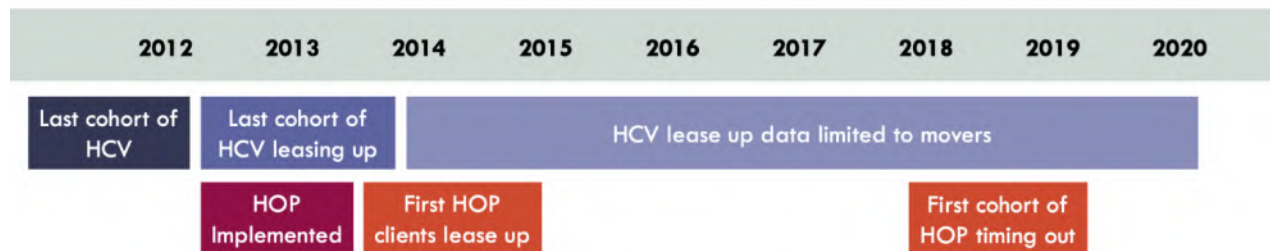
<sup>8</sup> Joint Center for Housing Studies, 2021. <https://www.jchs.harvard.edu/blog/interactive-tool-illustrates-disparate-economic-impacts-pandemic>

<sup>9</sup> Rental assistance programs often require that the household demonstrate that COVID has had a direct impact on their employment/wages. Clients whose employment has not been impacted, but simply cannot afford their rent should it increase, will not be deemed eligible for COVID-related rental assistance.

## A NOTE ABOUT DATA

THA stopped issuing Housing Choice Vouchers when HOP was implemented. Additionally, the move to Open Door, THA's administrative database, resulted in limited access to data prior to 2012. To ensure sample populations were comparable when looking at entry and exit data, PIE staff had to limit the analysis to the final cohort of HCV participants. These participants were issued a voucher in 2012 and, if successful leasing up, were housed between 2012-14. While this limits the sample set, it does provide a group that we can compare early HOP households to. Both groups entered at roughly the same time and when we look at household that exit at roughly the same time we can control for outside factors that may impact household outcomes. This is especially important since the rental landscape has changed dramatically over the last five years.

Households moving with an HCV were included in the lease up analysis to see if and how shopping with an income-based subsidy compared to shopping with a fixed subsidy as the rental market became more competitive.

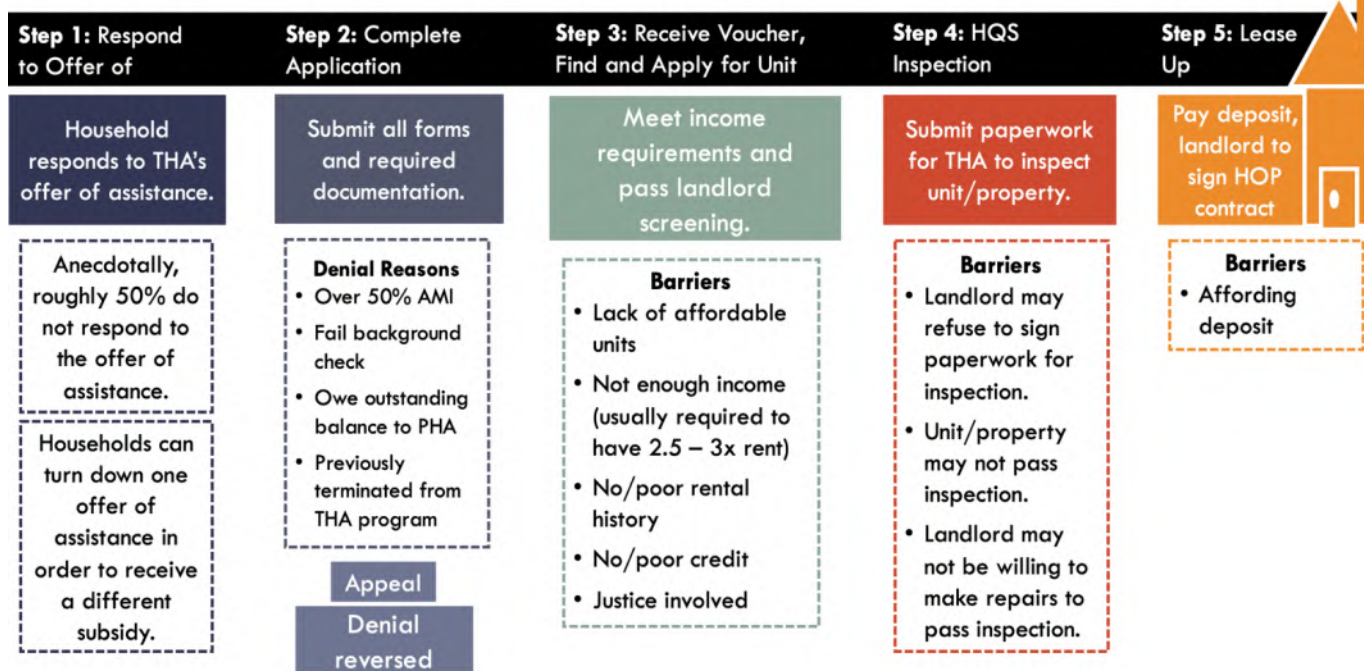


Additionally, HOP data is presented in two ways. Participants in CHAP and CHOP make up nearly 20% of the households receiving a HOP subsidy. However, these are special programs with additional program requirements. Many charts will present the combined HOP data and include a section that separates out CHAP and CHOP from HOP. Additional findings and discussion about CHAP and CHOP are presented in Appendices A and B.

## LEASING

All households that receive a HOP or HCV subsidy go through the same process once pulled from the waitlist. Receiving an offer of assistance does not always guarantee that a household will be able to find and secure affordable housing. The following graphic details the process and the barriers that may prevent households from moving forward to the next step.

### From Offer of Assistance to Housed



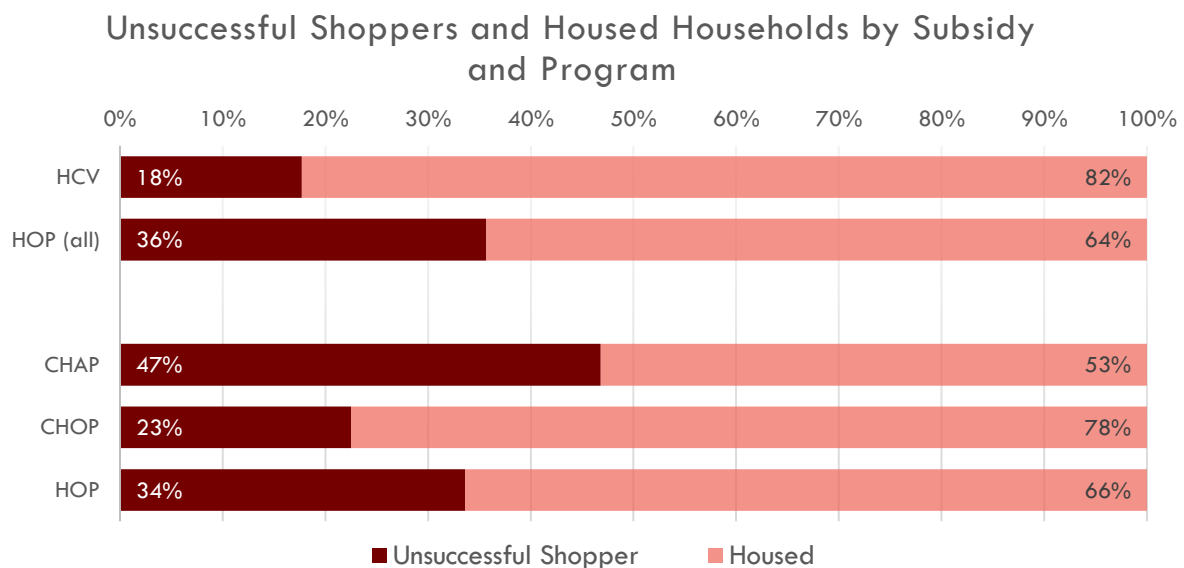
It is important to note that the barriers listed under Step 3 (find and apply for a unit) are additional screening criteria set by private landlords. THA does not have control over how strict the landlord is in defining screening criteria or what level of income they require of tenants to income qualify for the unit.

To understand if HOP participants encounter greater barriers leasing up than HCV participants, PIE analyzed lease-up data for all households that were provided a shopping voucher between 2012 and 2020. The data in this section includes new admissions *as well as movers* (this allows us to see how HCV compares to HOP as the rental market became more competitive). When shopping for housing, households are given 90 days. If they are unsuccessful, they may apply for an additional 120-day extension. If they are unable to secure housing in that time, they are defined as an unsuccessful shopper.

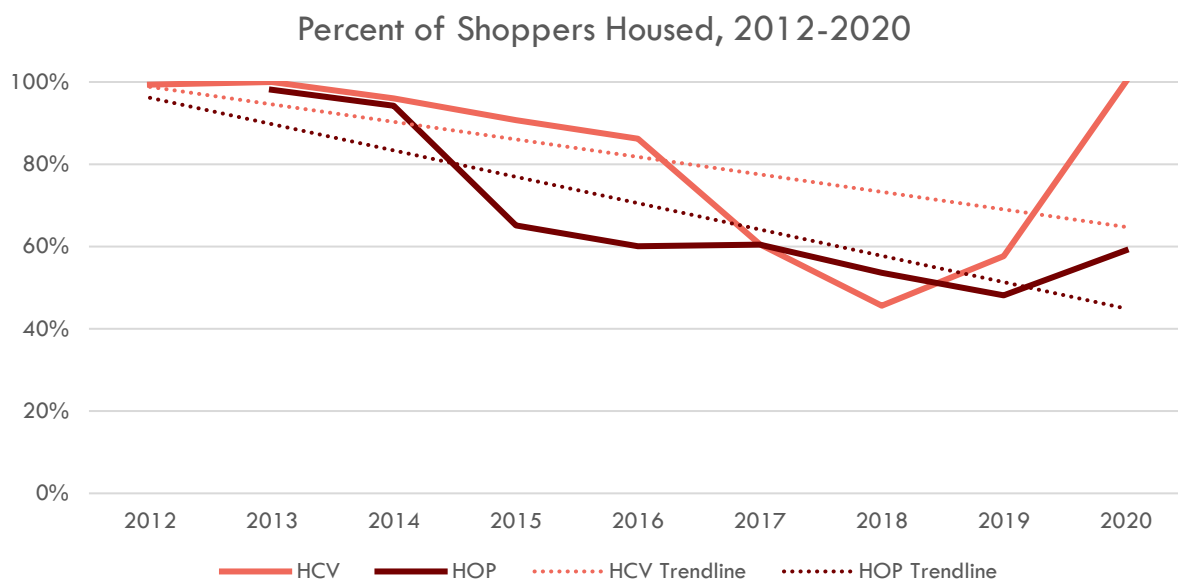


***HCV households had a greater likelihood of securing housing than HOP households.***

The vast majority (82%) of HCV households were successful in leasing a unit compared to 64% of HOP households. Participants in the College Housing Assistance Program (CHAP) were the least likely to have success using their voucher.



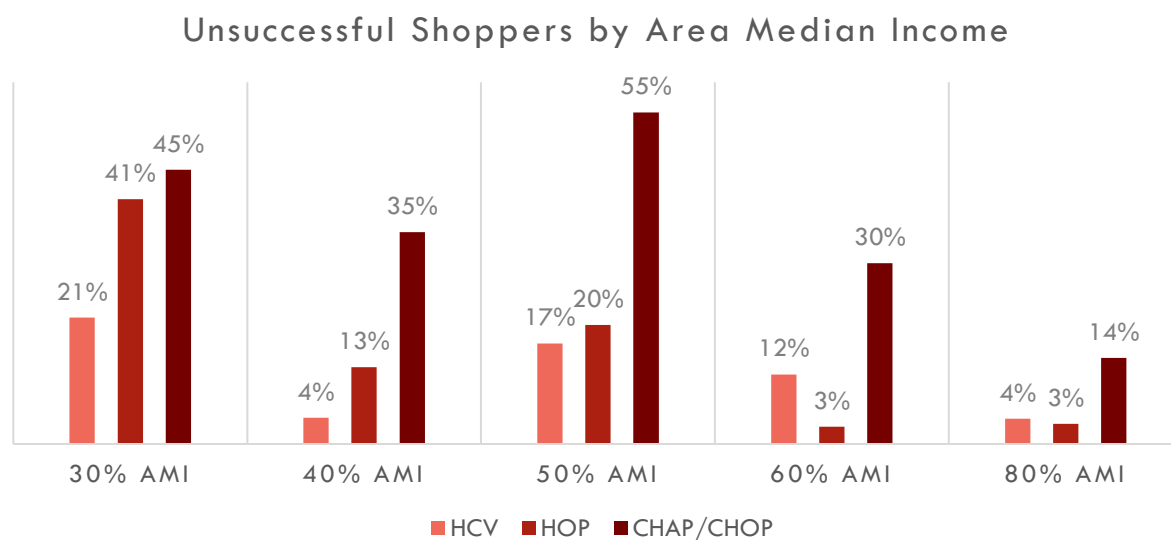
Additionally, when analyzing how shoppers have fared over time, it is clear that changes in the rental market have hurt participants in both programs. However, HCV households have generally maintained greater lease up rates when compared to HOP households.



***Extremely low-income households with a HOP voucher were least successful in securing a unit.***

Extremely low-income households (those earning 30% of the area median income or less) with a HOP voucher were twice as likely to be unsuccessful in securing a unit as extremely low-income households with a traditional HCV. This finding is important as households at or below 30% AMI make up nearly three quarters of our voucher recipients.

Shoppers in special programs CHAP and CHOP are consistently less likely to lease up with a shopping voucher across all income levels.



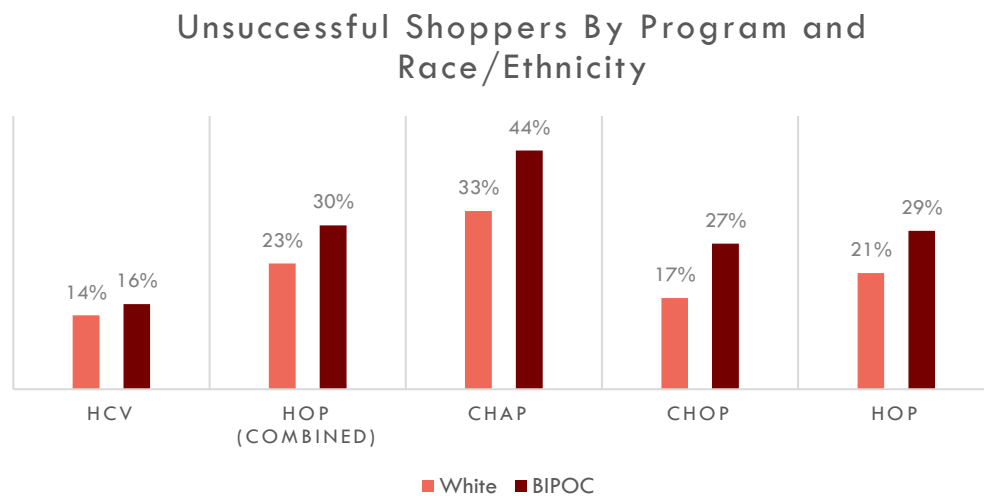
These findings can best be explained when we consider what it takes for a household to meet private landlords' screening criteria. Most often, landlords require that a household make 2.5-3 times their portion of the rent to income qualify. The scenarios on the following page demonstrate three common circumstances for THA clients: lack of employment (Scenario A), living on a fixed income (Scenario B), and being at 20% area median income (this represents the average household that qualified for a two-bedroom unit and was issued a voucher between 2018 and 2020).

The following scenarios assume that the contract rent is the same as the current payment standards. Voucher size is based on two heartbeats per room. Tenant rent for the HCV program is based on 30% of the household's monthly income (THA also has a minimum rent amount, which is why Scenario A shows \$75 in rent). The tenant portion of the rent for HOP is 50% of the payment standard.

|  | Scenario A:<br>Unemployed couple with an infant.<br>The family qualifies for a 2-bedroom payment standard. |            | Scenario B:<br>Single elderly individual on fixed \$791/mo SSI payment.<br>They qualify for a 1-bedroom payment standard. |            | Scenario C:<br>Single parent with three children, working 25 hrs/week for \$15.<br>The family qualifies for a 2-bedroom payment standard. |            |
|--|--|------------|---|------------|---|------------|
| <b>Household Characteristics</b>           |  |            |   |            |   |            |
| 1. Annual Household Income                 | \$0  |            | \$9,492   |            | \$19,500  |            |
| 2. Voucher Size                            | 2  |            | 1   |            | 2   |            |
| 3. Payment Standard/Contract Rent          | \$1,484  |            | \$1,162   |            | \$1,484   |            |
| <b>Subsidy Program</b>                     | <b>HOP</b>   | <b>HCV</b> | <b>HOP</b>  | <b>HCV</b> | <b>HOP</b>  | <b>HCV</b> |
| 4. Rent based on 30% of income             |  | \$75       |   | \$237      |   | \$487      |
| 5. Rent based on 50% of payment standard   | \$742  |            | \$581   |            | \$742   |            |
| 6. Portion of monthly income spent on rent | >100%  |            | 73%   | 30%        | 46%   | 30%        |

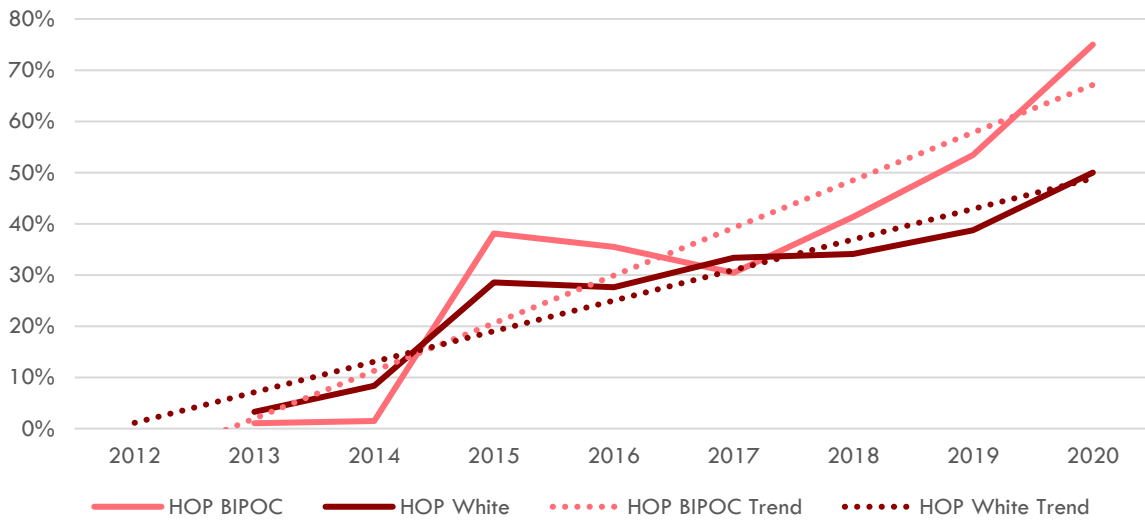
***Black, Indigenous, and people of color (BIPOC)-headed households are less likely to lease up than white households, but the disparity is less for HCV households.***

When comparing lease up outcomes by program and race/ethnicity, there is a disparity between white households and BIPOC households across all programs. However, the disparities are worse on those programs using a HOP subsidy. Regarding HCV, BIPOC households have lower lease-up rates than white households, but the difference is two percentage points as opposed to seven.



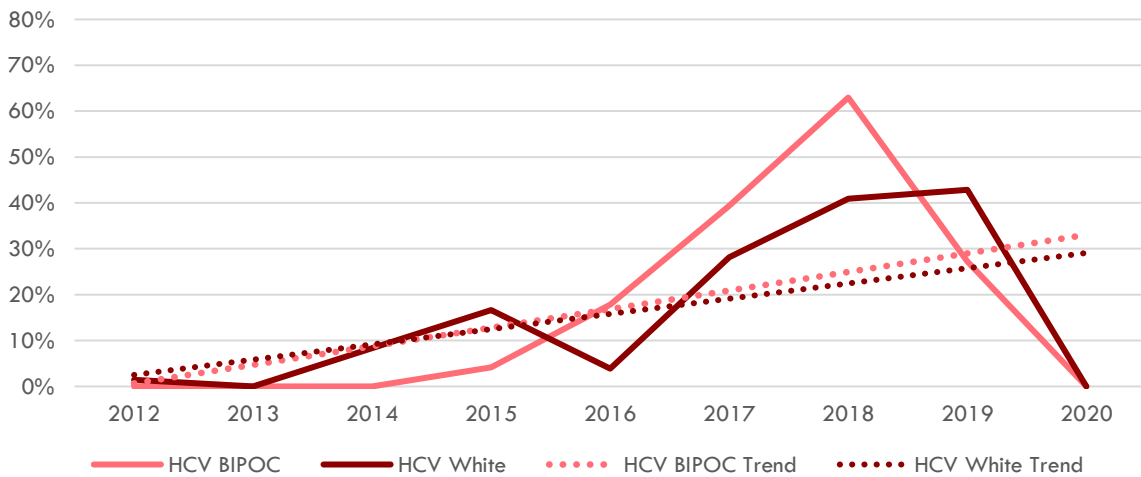
Additionally, as the market has become more competitive over time, the rates of unsuccessful shoppers have increased. However, BIPOC households shopping with a HOP subsidy been most negatively impacted.

Percent of Unsuccessful Shoppers, HOP 2013-2020



In comparison, though HCV shoppers have also experienced an increase in people not leasing up, the trends do not demonstrate the disparate impact that we observe with HOP.

Percent of Unsuccessful Shoppers, HCV 2012-2020



***Regardless of how shopping data is disaggregated, nearly all demographic groups have greater lease up success on HCV compared to HOP.***

| Lease Up Success by Demographics | HCV         |     | HOP        |      |
|----------------------------------|-------------|-----|------------|------|
|                                  | % Housed    | N   | % Housed   | N    |
| All clients                      | <b>82%</b>  | 486 | 64%        | 1498 |
| Female                           | <b>81%</b>  | 383 | 68%        | 1122 |
| Male                             | <b>88%</b>  | 101 | 55%        | 376  |
| BIPOC                            | <b>84%</b>  | 250 | 70%        | 721  |
| White                            | <b>87%</b>  | 200 | 77%        | 312  |
| BIPOC - Female                   | <b>84%</b>  | 200 | 74%        | 539  |
| White - Female                   | <b>84%</b>  | 155 | 78%        | 237  |
| BIPOC - Male                     | <b>88%</b>  | 49  | 58%        | 182  |
| White - Male                     | <b>98%</b>  | 44  | 75%        | 75   |
| African American/Black           | <b>86%</b>  | 168 | 76%        | 340  |
| American Indian/Alaska Native    | 71%         | 7   | 71%        | 17   |
| Asian American                   | <b>100%</b> | 14  | 83%        | 40   |
| Multiple Races                   | <b>100%</b> | 13  | 58%        | 76   |
| Native Hawaiian/Pacific Islander | <b>74%</b>  | 19  | 67%        | 30   |
| White                            | <b>85%</b>  | 226 | 79%        | 403  |
| Unknown/Did not disclose         | 46%         | 39  | <b>47%</b> | 592  |
| Hispanic (race not disclosed)    | <b>67%</b>  | 3   | 43%        | 127  |
| Hispanic White                   | 73%         | 26  | <b>86%</b> | 91   |
| Hispanic BIPOC                   | <b>88%</b>  | 8   | 86%        | 59   |
| Non-Hispanic White               | <b>87%</b>  | 200 | 77%        | 312  |
| Non-Hispanic BIPOC               | <b>86%</b>  | 213 | 75%        | 398  |
| 30% AMI                          | <b>79%</b>  | 353 | 58%        | 1127 |
| 40% AMI                          | <b>96%</b>  | 46  | 83%        | 186  |
| 50% AMI                          | <b>83%</b>  | 36  | 73%        | 101  |
| 60% AMI                          | 88%         | 26  | <b>91%</b> | 45   |
| 80% AMI                          | <b>96%</b>  | 24  | 95%        | 37   |

## INCOME

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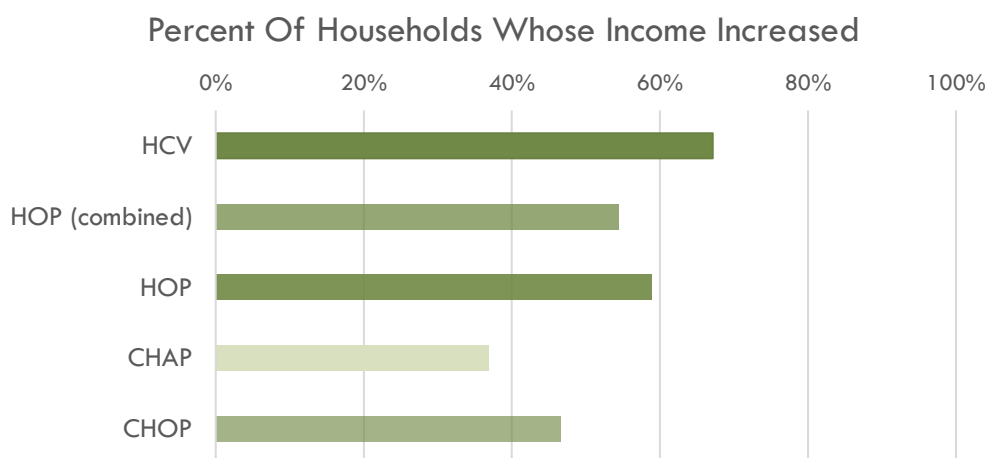
A commonly stated goal of the HOP subsidy model is to incentivize increasing one's wages. To assess if the program has been successful in achieving this aim, PIE staff analyzed income changes among households that received a subsidy in 2012 or later and exited between 2012 and 2020.<sup>10</sup> By including 2012, PIE is able to observe income changes among the most recent cohort of HCV recipients who entered the program before HOP was implemented in 2013.

While this creates somewhat of a comparable comparison group, it is important to note that HOP households who secure housing have a higher income than HCV households – their median income is 127% of the HCV median income. This difference is likely a reflection of the flat subsidy model, which, as addressed in the previous section, has less buying power for lower income households. As a result, extremely low-income households are more likely to be underrepresented in HOP's population.

### ***HCV households demonstrate a greater chance of increasing their income than HOP.***

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Overall, HCV households (work-able and elderly/disabled) were more likely to experience an increase in income (67% of the total population) than HOP households (54%) between the time they entered the program and exited. CHAP and CHOP participants had the lowest proportion of households that experienced an increase in their income.



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<sup>10</sup> Income data is not available for households that entered prior to 2012.



***Work-able households were more likely to increase their incomes on HCV than HOP.***

To understand how work-able clients' income changed while on the program, PIE staff looked at the last cohort of households to receive standard HCV assistance (those housed in 2012-2013). Their incomes were then compared to HOP households that entered in 2013-2014. The analysis focused on the households that exited between 2018-2020 from these two cohorts. This narrower analysis was an attempt to capture a snapshot of income changes over a given period for people receiving a similar length of assistance.

Markedly, 85% of work-able HCV households increased their income while receiving assistance compared to just 60% of work-able HOP households. Further, the average HCV household increased their income by nearly 200% while HOP households only increased their income by 33%. Though the sample sizes are small, at 90% significance, the difference is considered significant.

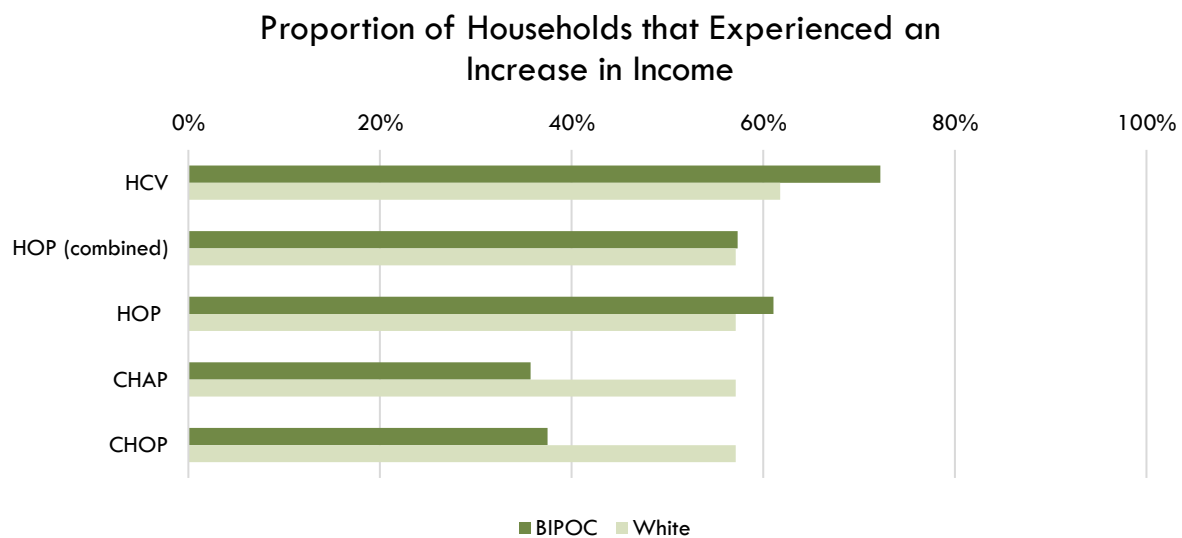
|                           | Avg length of assistance | Avg HH Size | Income Measure | Income at Entry | Income at Exit | Change in Income    | % of HH with increased income |
|---------------------------|--------------------------|-------------|----------------|-----------------|----------------|---------------------|-------------------------------|
| HCV (n=13 <sup>11</sup> ) |                          |             | Average        | \$11,610        | \$33,976       | \$22,366<br>(+192%) | 85%                           |
| Housed 2012-13            | 6.1                      | 3.2         | Median         | \$10,836        | \$31,512       | \$19,139<br>(+176%) |                               |
| Exited 2018-20            |                          |             |                |                 |                |                     |                               |
| HOP (n=65 <sup>12</sup> ) |                          |             | Average        | \$16,402        | \$21,876       | \$5,474<br>(+33%)   | 60%                           |
| Housed 2013-14            | 4.6                      | 2.6         | Median         | \$16,884        | \$19,800       | \$2,993<br>(+18%)   |                               |
| Exited 2018-20            |                          |             |                |                 |                |                     |                               |

<sup>11</sup> 86 work-able households entered 2012-13. 57 have since exited (66%). 23% of those exits occurred between 2018-20 (15% of the total work-able households that entered in 2012-13).

<sup>12</sup> This excludes CHAP and CHOP. 149 work-able households entered 2013-2014. 135 have since exited (90%). 48% of the exits occurred between 2018-20 (44% of the total work-able households that entered 2013-14).

***The proportion of white households that experienced an increase in income held steady across all programs, whereas BIPOC households on HOP's special programs were least likely to experience an increase in income.***

BIPOC households that received an income-based subsidy were more likely to experience an increase in income than any other population. Conversely, BIPOC households were less likely to experience an increase in income if they were participating in CHAP or CHOP. This may reflect more stringent program requirements that have unintended and disproportionate negative impacts on people of color. While part of the HOP program, CHAP and CHOP are addressed separately and in more detail in Appendix A and B.



***Across nearly all groups, HCV participants have a higher likelihood of having increased their income by the time they exit from assistance.***

In general, HCV households had a greater likelihood of experiencing income gains than HOP households. When disaggregated by demographic characteristics and program type, this trend holds true. This was also true in the 2018 HOP Evaluation where HCV households admitted in 2012 increased their earnings by 90% by 2017 while 2013 HOP household wages increased by only 45% over that same period. Further, households served through THA's unique HOP subsidy program, CHOP and CHAP, saw income decreases.

| Proportion of Households who Increased their Income | HCV                |    | HOP                |     |
|---|--------------------|----|--------------------|-----|
|   | % Increased Income | N  | % Increased Income | N   |
| All clients   | 67%                | 70 | 54%                | 406 |
| Female  | 64%                | 53 | 53%                | 328 |
| Male  | 76%                | 17 | 62%                | 78  |
| BIPOC   | 72%                | 36 | 57%                | 239 |
| White   | 62%                | 34 | 57%                | 114 |
| BIPOC - Female                                      | 72%                | 29 | 54%                | 191 |
| White - Female                                      | 54%                | 24 | 56%                | 93  |
| BIPOC - Male  | 71%                | 7  | 71%                | 48  |
| White - Male  | 80%                | 10 | 62%                | 21  |
| African American/Black                              | 60%                | 20 | 57%                | 130 |
| American Indian/Alaska Native                       | 50%                | 2  | 56%                | 11  |
| Asian American                                      | 100%               | 4  | 73%                | 9   |
| Multiple Races                                      | 100%               | 4  | 64%                | 22  |
| Native Hawaiian/Pacific Islander                    | 100%               | 2  | 71%                | 7   |
| White   | 63%                | 38 | 57%                | 142 |
| Unknown/Did not disclose                            |                    |    | 40%                | 85  |
| Hispanic White                                      | 75%                | 4  | 67%                | 27  |
| Hispanic BIPOC                                      | 50%                | 2  | 57%                | 30  |
| Hispanic (race not disclosed)                       |                    |    | 47%                | 30  |
| Non-Hispanic White                                  | 62%                | 34 | 58%                | 152 |
| Non-Hispanic BIPOC                                  | 73%                | 30 | 57%                | 112 |
| Non-Hispanic (race not disclosed)                   |                    |    | 36%                | 55  |
| Elderly/Disabled                                    | 63%                | 19 | 68%                | 50  |
| Elderly/Disabled or Near-Elderly                    |                    |    | 68%                | 28  |
| Near Elderly  | 75%                | 8  | 48%                | 42  |
| Work Able/Not Working                               | 69%                | 13 | 33%                | 103 |

|                   |     |    |     |     |
|-------------------|-----|----|-----|-----|
| Work Able/Working | 67% | 30 | 62% | 183 |
|-------------------|-----|----|-----|-----|

## PROGRAM EXITS

To further understand program efficacy, PIE analyzed the timing and nature of HOP household exits. According to administrative data, over three quarters of work-able HOP households exit before reaching the 5-year time limit. This finding calls for a deeper analysis into the reasons why households decided to give up or lose their voucher.

Unfortunately, exit reason is an inconsistent and unreliable field in Open Door. To address this challenge, PIE staff reviewed the account notes of a random sampling of 50% (n=120) of HOP households that exited between 2018 and 2020. Nearly 300 HCV households also exited between 2018 and 2020. 50% (n=145) of those households were also reviewed to determine the circumstances of their exits. The analysis was limited to 2018-20 to better understand if and how recent changes in Tacoma's housing market have impacted clients and their experiences.

| Program      | Number of Records Reviewed |
|--------------|----------------------------|
| HCV          | 145                        |
| CHAP         | 23                         |
| CHOP         | 5                          |
| HOP          | 92                         |
| <b>Total</b> | <b>265</b>                 |

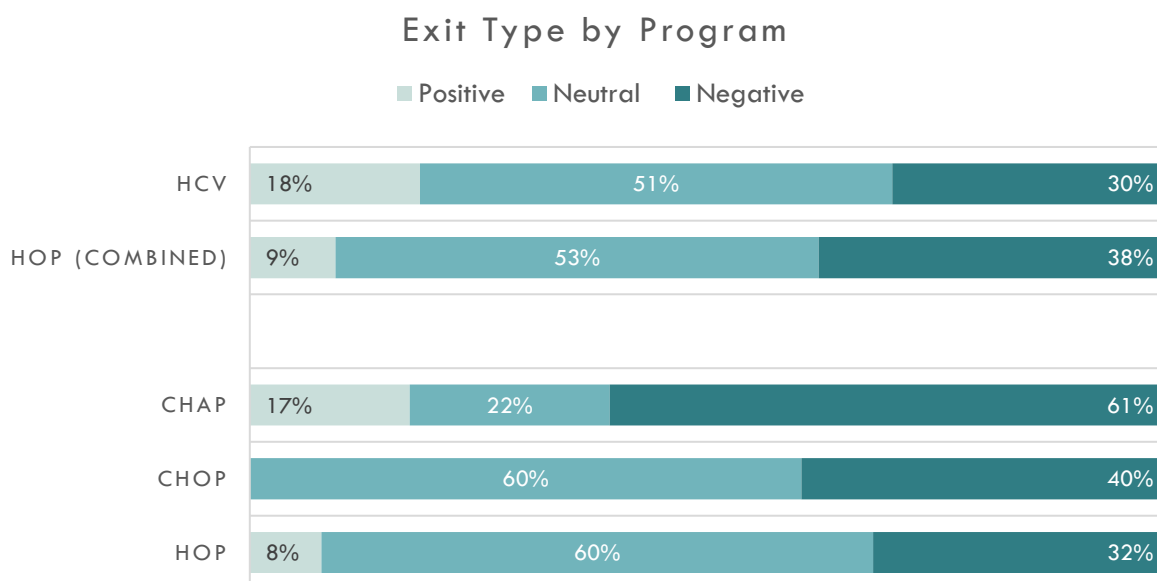
Using the account notes, PIE summarized the households' exit reasons and categorized their exit as positive, neutral, or negative. The table below outlines which types of exits fall into each category.

| Positive   | Neutral   | Negative   |
|--|---|--|
| <ul style="list-style-type: none"> <li>Over-income</li> <li>Self-sufficient</li> <li>Purchased a home</li> <li>Graduated (CHAP)</li> </ul> | <ul style="list-style-type: none"> <li>Reached time limit</li> <li>Admin error</li> <li>Self-terminated (no reason provided)</li> <li>Accepted other subsidized housing</li> <li>Death</li> </ul> | <ul style="list-style-type: none"> <li>Termination (eviction, failure to comply with program obligations, etc.)</li> <li>Loss of eligibility</li> <li>Received notice to vacate/move</li> <li>Voucher expired before finding another unit</li> </ul> |

### ***HOP households have higher rates of negative exits.***

Though the numbers are lower than THA may desire, the likelihood of HCV households exiting under positive circumstances is double that of HOP households. Of all HOP households, CHAP participants are

more likely to experience a positive exit. This is due in part because graduation is considered a positive exit and is only applicable to CHAP. Despite higher positive exits, CHAP participants were nearly twice as likely as other HOP households to have their housing assistance end for negative reasons – likely due to more stringent program requirements. Based on the sample of households, HCV households have the highest proportion of positive exits and the lowest proportion of negative exits.



***HCV households have a greater likelihood of exiting due to self-sufficiency.***

Even though reaching the time limit is the most common reason for HOP exits, it only applies to about 20% of all exits. For the remaining 80% of exits, PIE’s review of account notes uncovered a wide variety of reasons why HOP households exit early. Unfortunately, achieving self-sufficiency (reaching >80% AMI) appears to be as common a reason as eviction or death. Conversely, self-sufficiency is the third most common reason for program exit for HCV households.

| HOP Exit Reasons                     | % of exits between 2018-2020 | HCV Exit Reasons                                      | % of exits between 2018-2020 |
|--------------------------------------|------------------------------|---|------------------------------|
| Time limit                           | 19%                          | Death   | 21%                          |
| Moved out (no reason)/Self terminate | 17%                          | Termination/Loss of Subsidy                           | 19%                          |
| Expired shopping voucher             | 14%                          | <b>Self-sufficient</b>                                | <b>18%</b>                   |
| No longer eligible                   | 10%                          | Self-Termination                                      | 13%                          |
| Termination/Loss of Subsidy          | 7%                           | Voucher Expiration                                    | 12%                          |
| Moved to other subsidized housing    | 7%                           | Moved (out of state, in with family, assisted living) | 11%                          |
| Death                                | 6%                           | Unknown   | 5%                           |

|                                    |           |                  |    |
|------------------------------------|-----------|------------------|----|
| Evicted                            | 6%        | Eviction         | 1% |
| <b>Over income/Self-sufficient</b> | <b>6%</b> | Purchased a home | 1% |
| Graduated                          | 3%        |                  |    |
| Admin error                        | 3%        |                  |    |
| Moved, new unit won't take voucher | 2%        |                  |    |
| Unknown                            | 2%        |                  |    |

***Across nearly all groups, HCV participants have a greater likelihood of exiting assistance under positive circumstances.***

The HOP subsidy model was created to allow more households to be given a chance to find housing with a voucher and for households on the waitlist to be served sooner. Further, one of THA's stated goals is to deliver housing assistance that is transformative and temporary. The exit data compiled and analyzed for this report suggests that while the assistance provided through HOP is temporary, it is unclear just how transforming it has been for current and past households.

| Exit Types                        | HCV      |          | HOP      |          |
|-----------------------------------|----------|----------|----------|----------|
|                                   | Positive | Negative | Positive | Negative |
| All clients                       | 18%      | 30%      | 8%       | 32%      |
| Female                            | 20%      | 32%      | 7%       | 32%      |
| Male                              | 13%      | 25%      | 10%      | 33%      |
| BIPOC                             | 20%      | 32%      | 7%       | 32%      |
| White                             | 13%      | 25%      | 10%      | 33%      |
| BIPOC - Female                    | 24%      | 33%      | 12%      | 40%      |
| White - Female                    | 12%      | 29%      | 0%       | 20%      |
| BIPOC - Male                      | 12%      | 29%      | 13%      | 27%      |
| White - Male                      | 14%      | 14%      | 0%       | 67%      |
| African American/Black            | 22%      | 32%      | 10%      | 40%      |
| American Indian/Alaska Native     | 0%       | 100%     | 0%       | 0%       |
| Asian American                    | 21%      | 14%      |          |          |
| Multiple Races                    | 25%      | 50%      | 0%       | 0%       |
| Native Hawaiian/Pacific Islander  | 33%      | 33%      | 0%       | 100%     |
| White                             | 15%      | 27%      | 9%       | 22%      |
| Unknown/Did not disclose          |          |          | 5%       | 33%      |
| Hispanic White                    | 29%      | 29%      | 33%      | 11%      |
| Hispanic BIPOC                    | 38%      | 25%      | 0%       | 0%       |
| Hispanic (race not disclosed)     |          |          | 8%       | 42%      |
| Non-Hispanic White                | 13%      | 27%      | 0%       | 23%      |
| Non-Hispanic BIPOC                | 20%      | 33%      | 9%       | 45%      |
| Non-Hispanic (race not disclosed) |          |          | 0%       | 29%      |
| Not Single Parent                 | 18%      | 28%      | 8%       | 32%      |
| Single Parent                     | 22%      | 38%      | 8%       | 33%      |

## RENT BURDEN

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The HOP subsidy model's central hypothesis is that time limits and flat subsidies incentivize work-able households to increase their earnings so they can afford private market rent once their assistance expires. The previous sections have shown that HOP households do not drastically increase their income while on the program. Additionally, when HOP households exit, they often do so before their time limit is up and likely for reasons outside of their control or due to negative circumstances. To better understand how these households are expected to fare on the private market without THA assistance, PIE analyzed market rent burdens (i.e. the proportion of income a household spends on rent) for current and exited households. We follow this analysis with findings from the Late Rent program administered in late 2020, which provided insights into which households were struggling to pay rent, even while receiving a subsidy.

The average rent burden calculations do not include households with \$0 income. To more accurately represent how households fare in Tacoma's rental market, rent burdens are categorized as not burdened (a household pays 30% or less of their income on rent), moderately burdened (a household spends 31-50% of the income on rent), or severely burdened (more than 50% of a household's income is spent on rent).

### ***Current HOP households face a greater rent burden on assistance than HCV households.***

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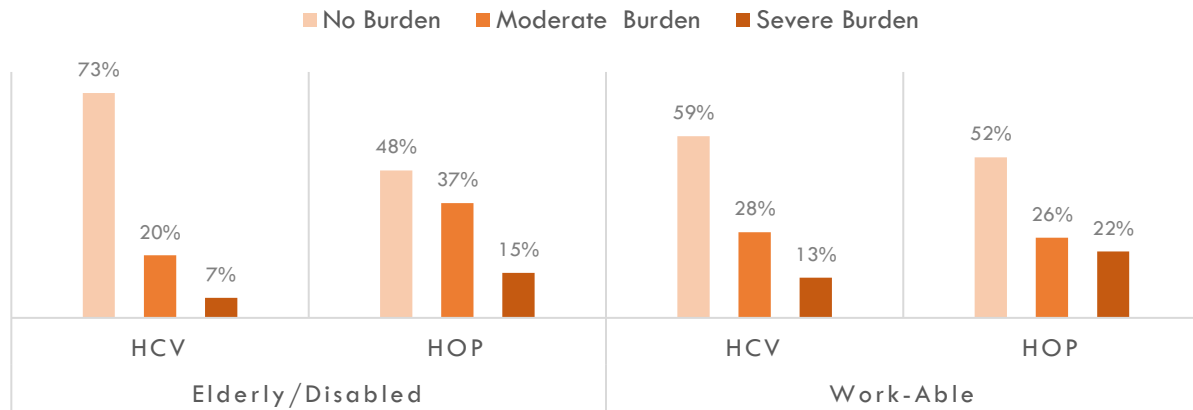
Despite HOP households having a higher income than HCV households at entry, roughly half are currently experiencing moderate or severe rent burdens while receiving assistance.<sup>13</sup> The HOP subsidy was designed to "thin the soup" by creating a slight increase in rent burden in order for more families to be served. The original HOP proposal estimated that the average rent burden would be only a few percentage points higher than the average HCV rent burden. However, severe rent burdens (>50% of income goes to housing expenses) are almost twice as likely on HOP than HCV.

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<sup>13</sup> In 2013 THA waived the 40% rule, allowing households to spend more than 40% of their income on rent in order to promote client choice and access to higher cost neighborhoods.



## Current Rent Burden



***Across all populations, HCV households are more likely to have lower rent burdens and less likely to experience severe rent burdens while receiving THA assistance.***

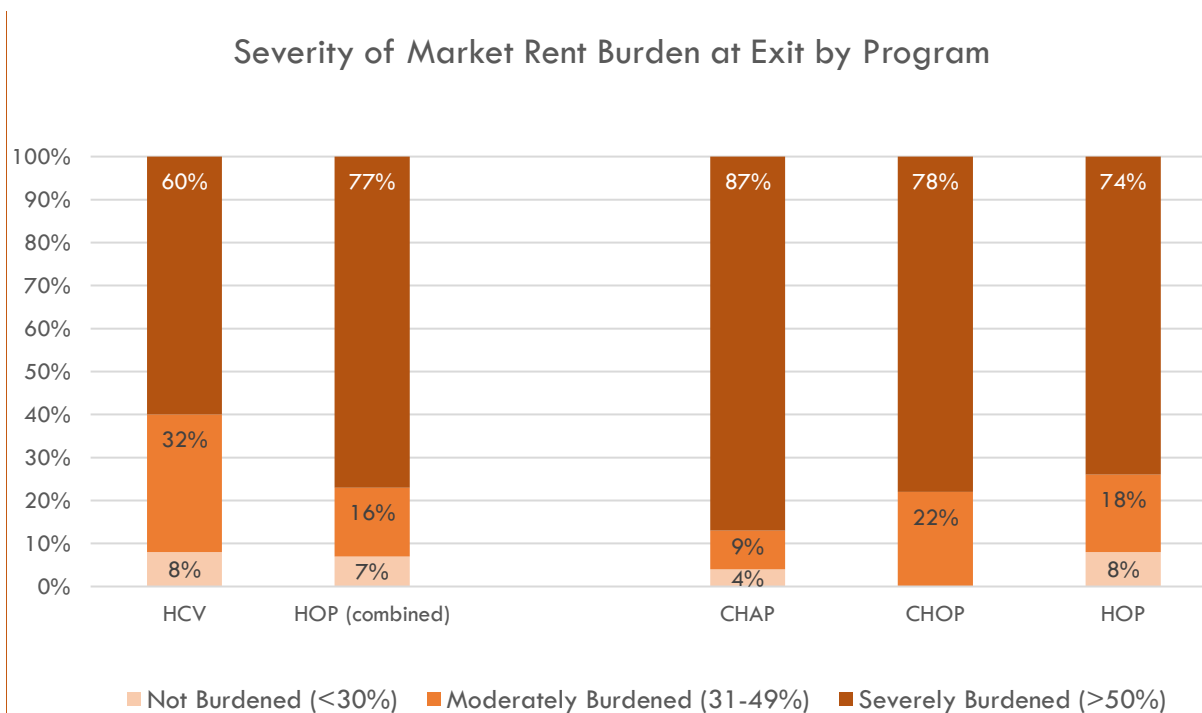
While HCV faces a slightly higher market rent burden, this data demonstrates that all households, regardless of subsidy program, face impossible rent amounts without THA's assistance.

| Current Rent Burden               | HCV        |                 |               | HOP        |                 |               |
|-----------------------------------|------------|-----------------|---------------|------------|-----------------|---------------|
|                                   | No Burden  | Moderate Burden | Severe Burden | No Burden  | Moderate Burden | Severe Burden |
| All clients                       | <b>66%</b> | <b>24%</b>      | <b>10%</b>    | <b>50%</b> | <b>33%</b>      | <b>18%</b>    |
| Female                            | <b>64%</b> | 25%             | <b>11%</b>    | 50%        | 32%             | 19%           |
| Male                              | <b>74%</b> | 20%             | <b>6%</b>     | 50%        | 36%             | 14%           |
| BIPOC                             | <b>64%</b> | 25%             | <b>11%</b>    | 49%        | 36%             | 15%           |
| White                             | <b>72%</b> | 23%             | <b>5%</b>     | 55%        | 27%             | 18%           |
| BIPOC - Female                    | <b>62%</b> | 26%             | <b>12%</b>    | 49%        | 36%             | 15%           |
| White - Female                    | <b>69%</b> | 25%             | <b>6%</b>     | 55%        | 24%             | 21%           |
| BIPOC - Male                      | <b>74%</b> | 20%             | <b>6%</b>     | 50%        | 36%             | 14%           |
| White - Male                      | <b>80%</b> | 17%             | <b>3%</b>     | 55%        | 35%             | 10%           |
| African American/Black            | <b>64%</b> | 24%             | 11%           | 33%        | 56%             | 11%           |
| American Indian/Alaska Native     | <b>70%</b> | 25%             | <b>5%</b>     | 51%        | 35%             | 14%           |
| Asian American                    | <b>76%</b> | 21%             | <b>3%</b>     | 56%        | 28%             | 17%           |
| Multiple Races                    | <b>63%</b> | 28%             | 9%            | 44%        | 50%             | <b>6%</b>     |
| Native Hawaiian/Pacific Islander  | <b>61%</b> | 30%             | <b>9%</b>     | 44%        | 11%             | 44%           |
| White                             | <b>71%</b> | 23%             | <b>6%</b>     | 54%        | 27%             | 19%           |
| Unknown/Did not disclose          | <b>53%</b> | 27%             | <b>21%</b>    | 42%        | 36%             | 22%           |
| Hispanic White                    | <b>64%</b> | 24%             | <b>12%</b>    | 48%        | 30%             | 22%           |
| Hispanic BIPOC                    | <b>72%</b> | 24%             | <b>3%</b>     | 53%        | 13%             | 33%           |
| Hispanic (race not disclosed)     | <b>41%</b> | 38%             | 22%           | 36%        | 55%             | <b>9%</b>     |
| Non-Hispanic White                | <b>72%</b> | 23%             | <b>5%</b>     | 55%        | 27%             | 17%           |
| Non-Hispanic BIPOC                | <b>66%</b> | 24%             | <b>10%</b>    | 49%        | 37%             | 14%           |
| Non-Hispanic (race not disclosed) | <b>59%</b> | 24%             | <b>17%</b>    | 38%        | 33%             | 29%           |
| Not Single Parent                 | <b>68%</b> | 23%             | <b>9%</b>     | 50%        | 38%             | 13%           |
| Single Parent Household           | <b>59%</b> | 28%             | <b>12%</b>    | 50%        | 23%             | 26%           |

|                  |            |     |            |     |     |     |
|------------------|------------|-----|------------|-----|-----|-----|
| Elderly/Disabled | <b>73%</b> | 20% | <b>7%</b>  | 48% | 37% | 15% |
| Work Able        | <b>59%</b> | 28% | <b>13%</b> | 52% | 26% | 22% |

***HOP households were more likely to exit with a severe rent burden than HCV households.***

2018-2020 exit data indicates that while HCV and HOP have similar rates of households exiting with a manageable low market rent burden, double the proportion of HCV households exit with a moderate rent burden than HOP households (32% compared to 16%). Across all programs, CHAP households exited with the highest rate of participants who were severely market rent burdened (87%). This is consistent with the findings in the previous sections – households exiting the HOP programs do not fare as well as households exiting HCV subsidy program and CHAP households appear to be the worse off than all other programs.



***HOP households have higher rates of exiting with a severe market rent burden.***

The vast majority of THA's households do not exit with manageable market rent burdens. However, households headed by BIPOC women (who make up the largest portion, roughly 50%, of THA's voucher holders), are twice as likely to exit with no market rent burden from the HCV program than from HOP. Further, across all groups, HCV households have lower rates of experiencing a severe market rent burden upon exit.

| Rent Burden at Exit               | HCV       |                 |               | HOP       |                 |               |
|-----------------------------------|-----------|-----------------|---------------|-----------|-----------------|---------------|
|                                   | No Burden | Moderate Burden | Severe Burden | No Burden | Moderate Burden | Severe Burden |
| All clients                       | 8%        | 32%             | 60%           | 8%        | 18%             | 74%           |
| Female                            | 11%       | 26%             | 63%           | 8%        | 18%             | 74%           |
| Male                              | 0%        | 50%             | 50%           | 9%        | 15%             | 76%           |
| BIPOC                             | 14%       | 21%             | 64%           | 10%       | 17%             | 73%           |
| White                             | 0%        | 45%             | 55%           | 5%        | 16%             | 80%           |
| BIPOC - Female                    | 18%       | 18%             | 64%           | 9%        | 16%             | 75%           |
| White - Female                    | 0%        | 38%             | 63%           | 6%        | 21%             | 74%           |
| BIPOC - Male                      | 0%        | 33%             | 67%           | 14%       | 19%             | 67%           |
| White - Male                      | 0%        | 67%             | 33%           | 0%        | 0%              | 100%          |
| African American/Black            | 17%       | 33%             | 50%           | 8%        | 17%             | 75%           |
| American Indian/Alaska Native     |           |                 |               | 0%        | 75%             | 25%           |
| Asian American                    | 0%        | 50%             | 50%           | 50%       | 0%              | 50%           |
| Multiple Races                    | 50%       | 0%              | 50%           | 0%        | 13%             | 88%           |
| Native Hawaiian/Pacific Islander  | 0%        | 0%              | 100%          | 0%        | 0%              | 100%          |
| White                             | 0%        | 36%             | 64%           | 9%        | 18%             | 74%           |
| Unknown/Did not disclose          |           |                 |               | 7%        | 17%             | 76%           |
| Hispanic White                    | 0%        | 0%              | 100%          | 25%       | 25%             | 50%           |
| Hispanic BIPOC                    | 20%       | 30%             | 50%           | 11%       | 0%              | 89%           |
| Hispanic (race not disclosed)     |           |                 |               | 9%        | 9%              | 83%           |
| Non-Hispanic White                | 0%        | 45%             | 55%           | 5%        | 16%             | 79%           |
| Non-Hispanic BIPOC                |           |                 |               | 6%        | 21%             | 73%           |
| Non-Hispanic (race not disclosed) |           |                 |               | 7%        | 29%             | 64%           |
| Not Single Parent                 | 12%       | 35%             | 53%           | 11%       | 16%             | 73%           |
| Single Parent Household           | 0%        | 25%             | 75%           | 5%        | 20%             | 76%           |

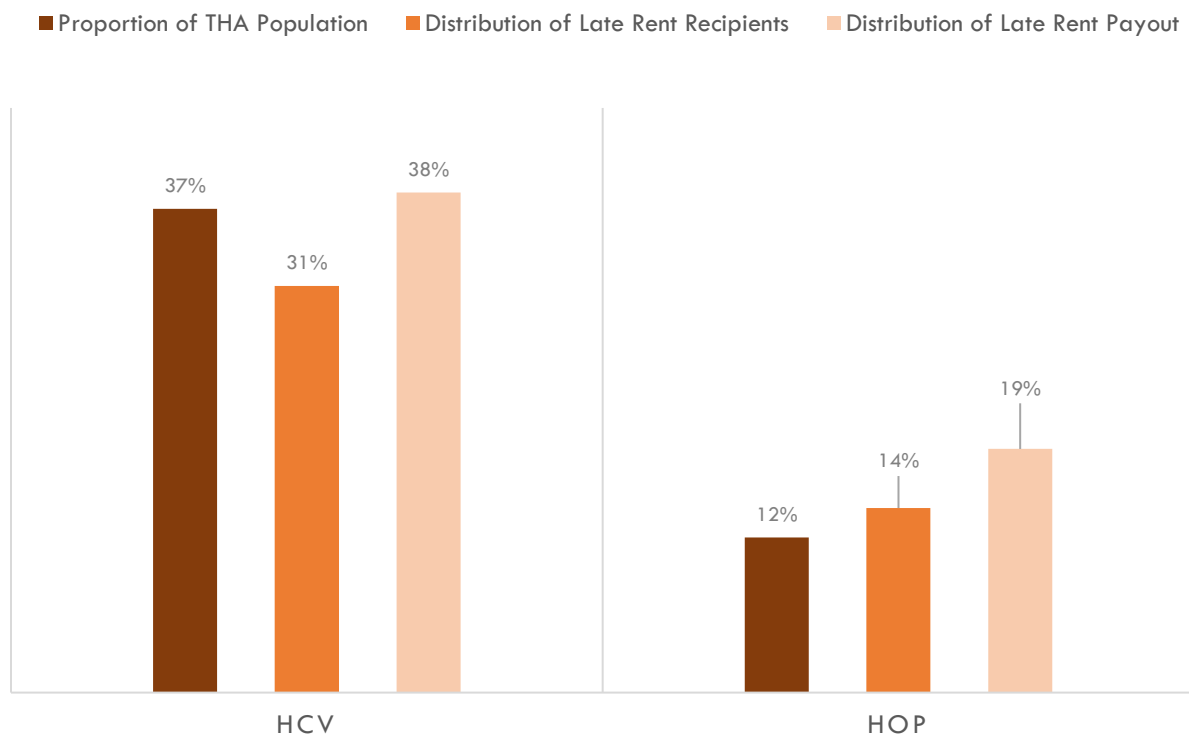
|                  |     |     |      |     |     |      |
|------------------|-----|-----|------|-----|-----|------|
| Elderly/Disabled | 0%  | 0%  | 100% | 0%  | 0%  | 100% |
| Work Able        | 11% | 42% | 47%  | 10% | 22% | 67%  |

### ***HOP households were overrepresented in the Late Rent program.***

In November 2020, Pierce County initiated a Late Rent program to help tenants address late rent balances. THA administered the program for THA households. In total, 11.75% of THA clients (592 households) received up to three months of late rent assistance. This figure only represents clients that were served through THA and not another agency. PIE staff were able to compile data from the late rent project to shed light on which THA client populations were most impacted.

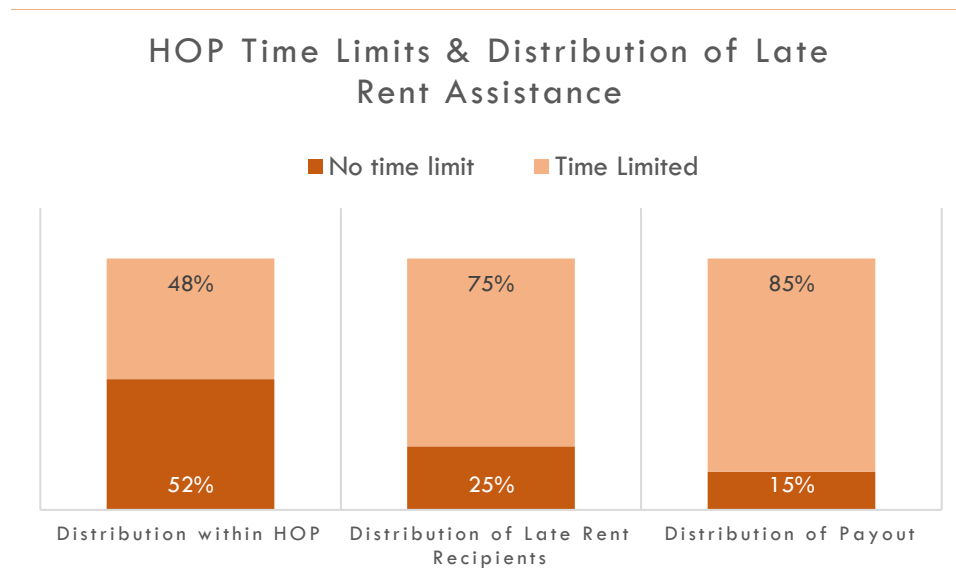
Distribution of Late Rent assistance was mostly reflective of how households are distributed across THA's programs. However, while HOP was overrepresented in the clients applying for assistance, HCV was underrepresented. HOP participants make up 12% of THA's population, they were 14% of the late rent recipients, but they received 19% of the total assistance paid out. However, even though HCV participants are 37% of THA's population, only 31% of the late rent assistance went to HCV clients.

### **Late Rent Distribution by Program**



***HOP households that are subject to the time limit were overrepresented in the Late Rent program.***

Nearly half of all HOP households are subject to time limits (meaning they do not qualify as elderly or disabled) yet these households represent 75% of HOP households that received late rent assistance. In terms of the amount of assistance provided to HOP households, a striking 85% was paid on behalf of households subject to time limits. It is very likely that this reflects COVID's impact on wage earners.



Across multiple measures (market rent burden and Late Rent Program assistance), HOP households appeared to be worse off than the HCV population. HOP households subject to time limits had the highest calculated market rent burden and received a disproportionate amount of Late Rent assistance, in terms of proportion of households and payout amount. These findings suggest that HOP households experience a higher level of instability and financial vulnerability, even though they enter the program with a higher average income than HCV households.

## SUMMARY & DISCUSSION – HOP INTENT VS. OUTCOMES

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THA's Moving to Work flexibility allows us to design and implement innovative programs to uncover if there are more effective and efficient ways to serve households in need of housing support. The Housing Opportunity Program is one of these innovations. The two main features that set HOP apart from HCV is the flat subsidy and time limit. HOP functions by giving everyone a little bit less with the intention to serve more. The time limit on assistance is one method to ensure THA can meet the goal of ensuring no one on our waitlist has to wait more than two years for assistance and that households in need of assistance get their turn on a THA program.

The goal of this report is to understand how the Housing Opportunity Program performs given the recent changes in the rental and economic landscape. Specifically, this report addresses which types of households are being effectively served by HOP and evaluates how effective HOP has been at fulfilling THA's mission:

*The primary mission of the Tacoma Housing Authority is to provide high quality, affordable housing and supportive services to persons and families in need. We seek to do this in ways that also get two other things done. First, we want the households we serve to succeed, not just as tenants, but also, as our mission statement contemplates, as "parents, students, wage earners and builders of assets." If they are capable of working, we want their time on our programs to be transforming in those ways, and temporary. We want this certainly for grownups. We want this success emphatically for children and youth because we do not wish them to need our housing when they grow up. Second, we want to help our communities succeed, and to do so equitably, with a shared prosperity. We want their success to leave room for all types and incomes of households. We seek to do our part in making neighborhoods "attractive places to live, work, attend school, shop, and play", and to help Tacoma and Pierce County be "safe, vibrant, prosperous, attractive, and just." When these efforts work, they are a very good use of a housing dollar.*

### **Notable Outcomes & Implications**

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The findings presented throughout the report highlight a few areas where HOP does not appear to be meeting our mission in the ways described above. To start, fewer households succeed in terms of securing housing. While this may aid in working through the waitlist at a faster rate (for every person whose shopping voucher expires another person from the waitlist gets pulled for a voucher), the data tells us that the households that are most economically marginalized are those less likely to be served by HOP. While HOP has enabled THA to serve more households, unfortunately, it does not do so indiscriminately.

Secondly, data indicates that HOP households are less likely to increase their wages than HCV households. While this may seem counterintuitive, there are a few factors to consider. The income-based subsidy is responsive to a household's change in income. This stability may allow a client to take a pause and use the available support to train for, find, and secure higher wage employment rather than take the first opportunity available for fear of getting behind on bills. The income-based subsidy may also be more appealing to landlords. The security that comes in knowing that THA's subsidy can be adjusted should a

family encounter unanticipated financial troubles, especially when there is not a time limit on assistance, would likely be more appealing to landlords – especially those local “mom and pop” landlords. These factors could increase chances of households being able to secure housing in areas with increased access to higher wage jobs, public transit, affordable childcare, etc.

Further, the time limit on HOP subsidies has been cited as the primary method used to help ensure households on the waitlist get a turn at assistance. It is undeniable that when we remove someone from our program or when someone is unsuccessful at leasing up with a voucher it creates an opportunity for someone else. However, the assumption that a voucher is a “golden ticket” and time limits will “spur people to strive” or “encourage families to increase their wages” is not supported by the data presented in this report. The HOP webpage states:

*The goal is to help our participants achieve true self-sufficiency by assisting them with their housing needs for a specific term. This incentivizes our participants to focus on securing better employment and prepares them for a better future. Families receive notices at every annual recertification indicating the number of years remaining on their term-limited subsidy along with continuous referral services to a variety of available resources.*

While it was assumed that a time limit and flat subsidy would provide extra motivation for households to increase their earnings, and despite higher referrals to the case workers and resources provided by the Client Support and Empowerment department, the outcomes suggest this is not an issue of individual motivation but a reflection of an increasingly unaffordable rental market and stagnant wages. Further, it is worthwhile to note that programs in which housing is conditioned upon external factors, such as school enrollment, demonstrate significantly lower positive outcomes for BIPOC households.

### **HOP Benefits & Efficiencies**

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Though client outcomes do not match THA’s original expectations, HOP has some proven successes regarding the administrative efficiencies that have been implemented with the program.

One significant benefit is that HOP allows for self-certification of income. There are specific instances where self-certification has proven accurate and efficient, such as for families with fixed incomes.

Another benefit of HOP, for the client, is that it permits alternative housing options. Specifically, a client can rent a room or lease from a relative in the following circumstances:

- A household cannot lease up because of poor credit
- A household would rely on the relative to help with childcare
- A household with poor rental history has remediated the root causes of for the bad rental history
- A household cannot lease because of poor criminal history that has shown proper rehabilitation

Given the competitive nature of Tacoma’s rental market, these alternative housing options increase housing opportunities for households that face added barriers.

THA’s MTW status allows us to test new ideas and implement new processes in the hopes of discovering ways to administer housing assistance that is more effective and efficient than traditional methods. The



HOP program has been a success in terms of the benefits discussed above. This innovation has given operations staff a different way of doing things that reduces the administrative burden on both the client and staff.

## RECOMMENDATIONS

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Across the board, households receiving HOP subsidy have had greater challenges leasing, smaller income gains, more negative exits, and higher rent burdens than households receiving a traditional income-based subsidy. While PIE cannot make causal claims about the program design (as the analysis did not include an experimental component), there was consistent correlation between negative household outcomes and HOP. The recommendations that follow are in response to those findings.

### ***Recommendation 1: Transition HOP Households to an Income-Based Subsidy***

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Disproportionate outcomes around leasing, income gains, rent burden, and late rent assistance lead to the conclusion that traditional income-based subsidies are more stabilizing and beneficial to a household's trajectory. To start, a troubling amount of HOP households are never successful at leasing up (36% for HOP overall and almost half for CHAP), leading one to contemplate if the flat subsidy is not enough to make up the difference between a household's income and market rent. Or, are they effectively closed out of the market? Additionally, the surprising outcomes around income gains and the subsequent impact on market rent burden could indicate that there is something stabilizing about a subsidy that is responsive to a household's financial reality and allows a family to make progressive steps toward increased income and self-sufficiency. Finally, the Late Rent project provided an indication of current need among the various populations. HOP households, especially those subject to time limits, were overrepresented by proportion and by payout amount, indicating there is greater need and instability among this population.

To ensure households can attain and sustain housing, PIE recommends transitioning households to the tiered income-based model that we use for HCV. The tiered income model allows households to increase their wages without increasing their portion of rent until they reach the next income tier. The tenant portion of rent is based upon the lowest income amount for the tier in which they fall.

In formulating this recommendation, PIE staff determined that one third of the HOP voucher holders would receive a smaller housing assistance payment (HAP) as a result of transitioning to an income-based subsidy. Though initially surprising, this reflects the fact that extremely low-income households are least likely to secure housing with a HOP voucher. As a result, HOP households generally have a higher income when admitted to the program compared to HCV households.

The table below identifies the average and median HAP increase and decrease for HOP households.

|                                  | Average HAP<br>Increase/Decrease | Median HAP<br>Increase/Decrease |
|----------------------------------|----------------------------------|---------------------------------|
| Households with a higher HOP HAP | -\$166                           | -\$123                          |
| Households with a higher HCV HAP | \$211                            | \$200                           |

Additionally, looking across all groups currently assisted through HOP, the data in the following table suggests that the benefits are fairly equitable across all groups and the increase in HAP is greater on average than the average decrease. Not only do more households benefit from an income-based subsidy than they do HOP, but the average increase in assistance is consistently greater than the decrease is for those households who would experience a higher rent payment. When THA households were previously consulted on HOP, they expressed a willingness to receive less support in order for THA to assist more people. It's an incredibly admirable and generous outlook and we suspect public consult will reaffirm that households are willing to reduce their assistance amount if it means increasingly the likelihood of more positive outcomes for other households.

| Impact of Conversion to Income-Based Subsidy | Household Whose Family Share Would Decrease |     |                    | Households Whose Family Share Would Increase |     |                    |
|--|---|-----|--------------------|--|-----|--------------------|
|  | %   | n   | Avg HAP Difference | %  | n   | Avg HAP Difference |
| All clients                                  | 67%   | 288 | \$211              | 33%  | 141 | -\$166             |
| Female                                       | 66%   | 218 | \$218              | 34%  | 113 | -\$176             |
| Male   | 71%   | 70  | \$189              | 29%  | 28  | -\$122             |
| BIPOC  | 68%   | 124 | \$212              | 32%  | 58  | -\$155             |
| White  | 69%   | 62  | \$200              | 31%  | 28  | -\$169             |
| BIPOC - Female                               | 70%   | 98  | \$218              | 30%  | 43  | -\$167             |
| White - Female                               | 64%   | 42  | \$216              | 36%  | 24  | -\$170             |
| BIPOC - Male                                 | 63%   | 26  | \$190              | 37%  | 15  | -\$121             |
| White - Male                                 | 83%   | 20  | \$165              | 17%  | 4   | -\$166             |
| African American/Black                       | 75%   | 67  | \$221              | 25%  | 22  | -\$141             |
| American Indian/Alaska Native                | 67%   | 2   | \$364              | 33%  | 1   | -\$113             |
| Asian American                               | 67%   | 10  | \$125              | 33%  | 5   | -\$144             |
| Multiple Races                               | 47%   | 7   | \$250              | 53%  | 8   | -\$195             |
| Native Hawaiian/Pacific Islander             | 71%   | 5   | \$192              | 59%  | 2   | -\$38              |
| White  | 63%   | 73  | \$202              | 35%  | 40  | -\$169             |
| Unknown/Did not disclose                     | 66%   | 124 | \$213              | 34%  | 63  | -\$175             |
| Hispanic White                               | 48%   | 11  | \$212              | 52%  | 12  | -\$168             |
| Hispanic BIPOC                               | 78%   | 7   | \$268              | 22%  | 2   | -\$183             |
| Hispanic (race not disclosed)                | 73%   | 22  | \$203              | 27%  | 8   | -\$176             |
| Non-Hispanic White                           | 71%   | 55  | \$201              | 29%  | 23  | -\$174             |
| Non-Hispanic BIPOC                           | 73%   | 80  | \$210              | 27%  | 29  | -\$154             |

|                                   |     |     |       |     |    |        |
|-----------------------------------|-----|-----|-------|-----|----|--------|
| Non-Hispanic (race not disclosed) | 64% | 68  | \$227 | 36% | 39 | -\$158 |
| Not Single Parent                 | 68% | 180 | \$199 | 32% | 83 | -\$142 |
| Single Parent Household           | 65% | 108 | \$230 | 35% | 58 | -\$199 |
| Elderly/Disabled                  | 68% | 180 | \$199 | 32% | 83 | -\$142 |
| Work Able                         | 65% | 108 | \$230 | 35% | 58 | -\$199 |

## ***Recommendation 2: Eliminate Time Limits***

The steep market rent burden coupled with the rate of Late Rent assistance requests show that HOP households, in particular those subject to time limits, are at extreme risk of losing their housing without THA's assistance. When HOP was initially proposed and THA consulted its landlord partners, many warned that a time limited voucher is not attractive to landlords and could serve as an obstacle for households who are trying to lease up with only a couple of years left on their voucher. Exit data appears to support this. The third most common reason HOP households exited early was that they faced circumstances where they needed to move and they were unable to lease up before their shopping voucher expired.

In addition, the hypothesis that the time limit encourages income gains does not hold true. The median change in income for work-able HCV households was more than five times that of HOP households. Further, HCV households were more likely to experience an increase in income (85% of the total work-able population) than HOP households (60%) between the time they entered the program and exited. When they do exit, HOP households were more likely to face a severe market rent burden than HCV households. Additionally, HOP households were as likely to exit for being over-income or for achieving self-sufficiency as they were to exit due to death or eviction. Finally, THA does not track households once they exit our programs, so it is unknown how many are able to secure housing on their own, how many enter the homelessness system, or how many move in with friends or family. The THA waitlist has only been open for households of three or more to apply since the first cohort of HOP would have reached their time limit. As such, we cannot determine how many households who have exited HOP would seek further assistance from THA.

The state's eviction moratorium helped many tenants avoid eviction due to an inability to pay rent due to lost wages. However, to avoid eviction, tenants must enter into a payment plan with landlords. It is unknown how many of voucher holders have entered into payments plans. Given the higher need for late rent assistance that we saw among time-limited HOP participants compared to HCV participants, it is reasonable to assume these households have a greater likelihood of having a payment plan in place. In some cases, these plans may be of a duration that extends beyond their time limited assistance. Further, entering into a payment plan also means that these households are paying a larger amount in rent than what THA has on record. Ending assistance while a household is midway through a repayment plan will likely cause additional financial and housing instability, stress, and potentially eviction.

Additionally, across all THA program we are seeing that households are staying longer on assistance. This is telling and a clear reflection of the increasingly competitive rental market and lack of affordable housing in Tacoma. THA's assistance is more important now than ever to ensure families can have adequate time to achieve economic stability. However, it should not be ignored that wages have not increased at the same rate as the cost of housing. Until (if) this changes, Public Housing Authorities' main purpose is to ensure low wage workers can obtain and maintain stable housing.

These troubling outcomes paired with the economic outlook for the region and country lead PIE to recommend that THA eliminate the time limit associated with HOP assistance. Though the time limit is intended to help ensure no one is on our waitlist without an offer of assistance for more than two years, the data has shown that 80% of HOP households are exiting the program for reasons other than the time limit. Extending the time limit is not the only factor impacting voucher turn over and the speed at which we serve the waitlist.

Related, serving our households on the waitlist is a topic that involves a myriad of factors beyond HOP's time limit. Future discussions regarding the households on our waitlist should take into consideration the impact that special programs, Choice Mobility, lease up support and success, as well as waitlist management have on the speed at which THA is able to work through the waitlist. Rental Assistance staff have shared that roughly half of the people on the waitlist never respond to an offer of assistance when their name has reached the top. Given the infrequency in which we open our waitlist and the use of a lottery to populate the list, it would be difficult to argue that the THA waitlist, as it currently stands, is a true and accurate reflection/measure of the need for housing assistance amongst our community members. In addition, we currently do not have an efficient way to track how many people on the waitlist turn down offers of one form of assistance for another<sup>14</sup> and how many are over income by the time an offer of assistance is extended. Lastly, we should not overlook the opportunities THA has taken advantage of to serve more households through avenues other than our waitlist, including recent allocations of new voucher subsidies.

While this recommendation reflects the evidence presented throughout this report, it is also supported by the findings in HUD's Family Options Study, a longitudinal, multi-site experimental study that allowed HUD to look at the impacts of different interventions for families experiencing homelessness. Housing Choice Vouchers with no services were compared to Rapid Rehousing with some services, and service intensive project based transitional housing. The study found that families offered a traditional HCV subsidy demonstrated greater success in terms of long-term housing stability, a reduction in intimate partner violence, psychological distress, food insecurity, and for children, a reduction in behavior problems, number of schools attended, and sleep problems.<sup>15</sup> A shift to income-based subsidies is also responsive to shifting national priorities and new investment in deep housing subsidy for qualifying households. The financial implications of these recommendations follow the recommendations.

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<sup>14</sup> Households on the waitlist can turn down one offer of assistance in order to receive a different subsidy. For instance, if a household is offered a HOP voucher they can decline it in order to wait for a THA unit.

<sup>15</sup> [Family Options Study: 3-Year Impacts of Housing and Services Interventions for Homeless Families, 2016](#)

### ***Recommendation 3: Halt Any Application of the HOP Subsidy to New Populations and Instead Offer Traditional Voucher Subsidies***

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While HOP serves diverse populations, the outcomes were consistent across households: leasing was a challenge, incomes did not increase as expected, and households exited with extreme rent burdens. However, CHAP participants experienced disproportionately negative outcomes compared to other HOP populations. This program, serving community college students experiencing housing insecurity and homelessness, also has strict eligibility requirements that could be contributing to this trend. Further recommendations for CHAP program changes, outside of the time limit and subsidy model, can be found in the appendix.

The findings presented in this report provide enough evidence to conclude that HOP is not producing the outcomes it was hoping to deliver. While PIE's investigation resulted in some more questions about the program, it has also affirmed that the model has not been effective to date and instead, resulted in negative unintended consequences for the households served. This is especially true when additional non-housing program requirements are a component.

Currently, there are two populations under consideration for HOP subsidy: households transitioning from the criminal justice system and households exiting Arlington Drive after one year of residence. The HOP subsidy should not be expanded to these households or any others. PIE instead recommends offering traditional voucher subsidies to these populations.

### ***Recommendation 4: Retain Practices that Reduce Administrative Burdens***

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As a result of changing rental market conditions paired with stagnation of wages, HOP has not made the impact the agency anticipated. However, it has allowed us to try new approaches to how we carry out recertifications. PIE recommends further consultation with the Rental Assistance department to consider if and how some of the administrative efficiencies can be applied to the HCV program.

## COST ANALYSIS

To understand the financial impact associated with these recommendations, PIE used current rental data from HOP households to convert their subsidy to HCV. This process involved identifying the appropriate income tier based on household size, adjusted annual income, and which utilities are covered by the landlord and tenant to determine the appropriate utility allowance based on their current residence and lease. This conversion was only carried out on households for which we have utility data. The resulting sample size was about 430 households, or 80% of current HOP (including CHAP and CHOP) households. The findings from those 80% are used to estimate the cost for all HOP, CHAP, and CHOP households.

| COST OF TRANSITIONING TO AN INCOME-BASED SUBSIDY        |             |                          |
|---|-------------|--------------------------|
| OPTION  | ANNUAL COST | ADDITIONAL COST          |
| Current Fixed Subsidy Program                           | \$4,018,545 | -                        |
| Option 1: Convert all tenants to income based           | \$4,579,170 | \$560,625 (14% increase) |
| Option 2: No harm - THA pays the higher of the two HAPs | \$4,929,315 | \$910,770 (22% increase) |

Converting all current HOP participants to an income-based subsidy would increase THA's housing assistance payment by nearly 15%, or \$560,000 annually.

Since a third of households would experience a lower HAP if they were moved over to an income-based voucher, PIE also calculated the cost if we were to allow households to receive the highest HAP payment of the two subsidy options. If households can maintain their HOP subsidy as opposed to moving immediately to an income-based subsidy, it would cost THA just over 20%, or \$900,000 more per year. However, THA would only bare this cost temporarily if these households were eventually moved over to an income-based subsidy.

While it is unlikely that a large portion of HOP households will suddenly move out of their current living situation in response to receiving an income-based voucher (data indicates the vast majority are not underhoused), it is worth highlighting that THA could anticipate an increase in the number of extremely low-income households served. As new clients enter the program, the likelihood that these households will have greater success in securing housing with a subsidy deeper than HOP increases. In turn, it's worth noting that the estimated HCV cost for the current HOP households may be lower than future costs. However, an increase in extremely low-income households would be an indicator that THA has made progress at ensuring all households, regardless of income level, have the same likelihood for lease up success.

## CONCLUSION

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Across all four areas explored in this report (leasing, income, program exits, and rent burden), HOP was associated with poorer household outcomes. This pattern is likely due to the compatibility of the program design (a flat subsidy and time limit) waning in response to external forces that have negatively impacted access and availability of affordable housing. When originally implemented in 2013, Tacoma's market still had pockets of affordability and the promise that households, if provided some limited resources and support, could progress, and eventually afford rent without THA assistance. An increasingly competitive and constrained rental market paired with the devastating economic impacts resulting from the pandemic, necessitate THA to reconsider if HOP is properly serving the need. According to our analysis, it is not keeping pace with household need, in particular those with extremely low incomes. Fortunately, THA and its partners are positioned to address this need with the forthcoming additional housing resources committed by the federal government.

While it is the charge of MTW agencies to innovate and test new ways to serve more households, it is also our responsibility to pivot when those innovations are not producing the outcomes they were intended to produce. To ensure THA can continue to carry out its mission of providing high quality, stable, and sustainable housing, PIE encourages the Board to consider the recommendations put forth in this report and give its support to carry out a robust consultation with the public and THA's households.

## APPENDIX A: CHAP

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CHAP has recently undergone two third-party evaluations. Temple University's Hope Center has gathered preliminary findings on participants who applied to CHAP between 2017 and 2019. The Hope Center evaluation has shed light on how successful students are applying for the program and leasing up. Future reports will address the following portion of the program life cycle: if and how housing impacts academic outcomes and retention.

The second evaluation was conducted by BERK Consulting. This evaluation looked at all CHAP participants, including those using a property-based subsidy. The intent of this evaluation was to understand what additional barriers students face on the program and once housed. THA's hope with this evaluation was to gain insight into why a larger portion of students were having difficulty meeting and maintaining eligibility requirements.

The findings from the reports, as well as administrative data from TCC and THA, brought the following issues to our attention:

### ***CHAP is not effectively serving the intended population.***

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The Hope Center's research uncovered that only one quarter of students who apply to CHAP end up securing housing. Most concerning, the students who do lease up are more likely to show stronger pre-existing navigational and academic skills, compared to those who do not lease up. Further, males and Black/African American students are least likely to secure housing.

Both the Hope Center evaluation and BERK report discussed the various challenges students reported facing in the search for housing. The following quotes from BERK's interviews help paint a picture of the challenges students face:

*"I had to go out into the community and find a place that would A) accept me: homeless, with little income, poor credit, the wreckage of addiction, past evictions, and B) accept a voucher. This was a struggle. I hit a lot of 'nos.' It took a about 3 months."*

*"Most places wouldn't accept the voucher. Even those that did required a certain credit score and income level if you don't have a cosigner, and those in CHAP are typically lacking those resources or they wouldn't be homeless. In fact, one place I applied to required that I have 3x rent in income on top of the amount of the voucher."*

In an effort to ease the barriers associated with finding housing, THA partnered with private developers to buy down rents to affordable levels for student. Yet, while rents are below market value, to income qualify students must demonstrate that they have an income of 2.5 – 3 times the rent amount and are able to pay a deposit of \$500 to nearly \$1,200, depending on the property. As a result, TCC has had difficulty referring students who are homeless to the property because many have incomes too low to income qualify. From April to November 2020, 16% of CHAP applicants at TCC reported \$0 income and just over half of the applicants stated they were unemployed. While CHAP prioritizes serving the most



vulnerable students through program policy, the reality is that students who are more financially secure, academically strong, and experienced/savvy at navigating bureaucracies are the ones that are actually being served while those most in need are left on the waiting list until they disenroll or secure employment. Much like the larger HOP findings, we see that the intended population is not always aligned with the population getting served.

### ***CHAP participants are experiencing inequitable outcomes.***

As mentioned in the previous section, the Hope Center evaluation found that Black/African American students were underrepresented in the number of students who were able to secure housing. In addition to disparities in becoming housed, the BERK evaluation identified that roughly 25% of participants exit the program early for not meeting eligibility requirements (drop in GPA, not maintaining fulltime enrollment, stopping out). However, as mentioned in the main report, PIE staff reviewed the account notes from a random sample of 50% (n=120) of HOP households that exited between 2018 and 2020. When the data was disaggregated by program, just over half of CHAP exits were a result of not maintaining eligibility.

| CHAP Exit Reason                     | % of exits between 2018-2020 |
|--------------------------------------|------------------------------|
| No longer eligible                   | 52.17%                       |
| Graduated                            | 17.39%                       |
| Moved out (no reason)/Self terminate | 17.39%                       |
| Evicted                              | 4.35%                        |
| Terminated                           | 4.35%                        |
| Time limit                           | 4.35%                        |

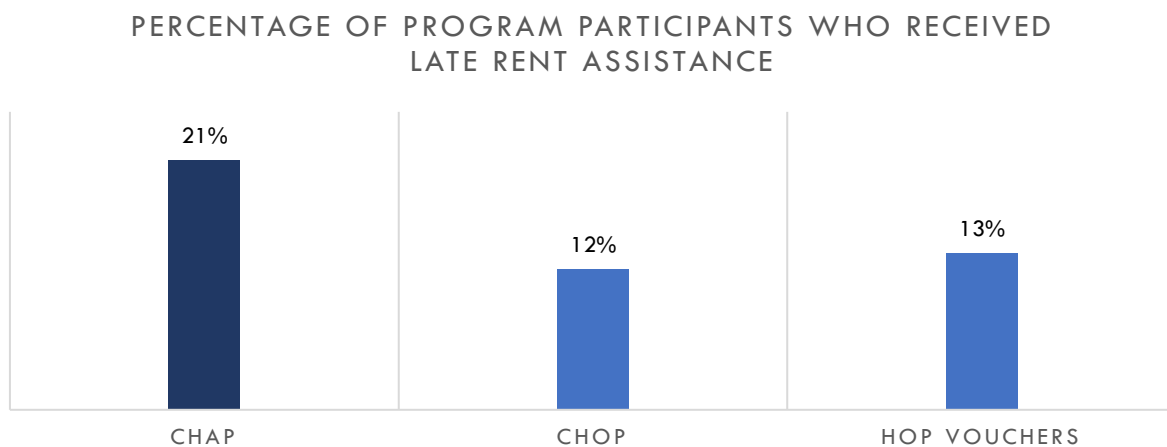
BERK's report indicated half of the students experiencing a negative exit were single parents. In fact, 26% of BERK's survey respondents who are the sole or primary caregiver for dependents struggle to meet CHAP eligibility every quarter – a rate that is nearly four times as high as students without dependents.

*"CHAP was amazing – I was a single mother of two kids, struggling financially. But a lot of requirements were things I couldn't do like being enrolled full-time. With my learning disabilities, I can't be enrolled full-time, be a single mother, work full-time, and also get good grades. But financially, I needed to work full-time... ..If I could have had financial support to guarantee that had I rent and bills paid, food on the table, and gas in the car, I could have stopped working and gone to school. Even if I had to go to school part-time, I could have focused on school full-time."*

When disaggregated by race and ethnicity, the data shows that the majority of students in every category are exited from the program due to negative reasons (no longer eligible).

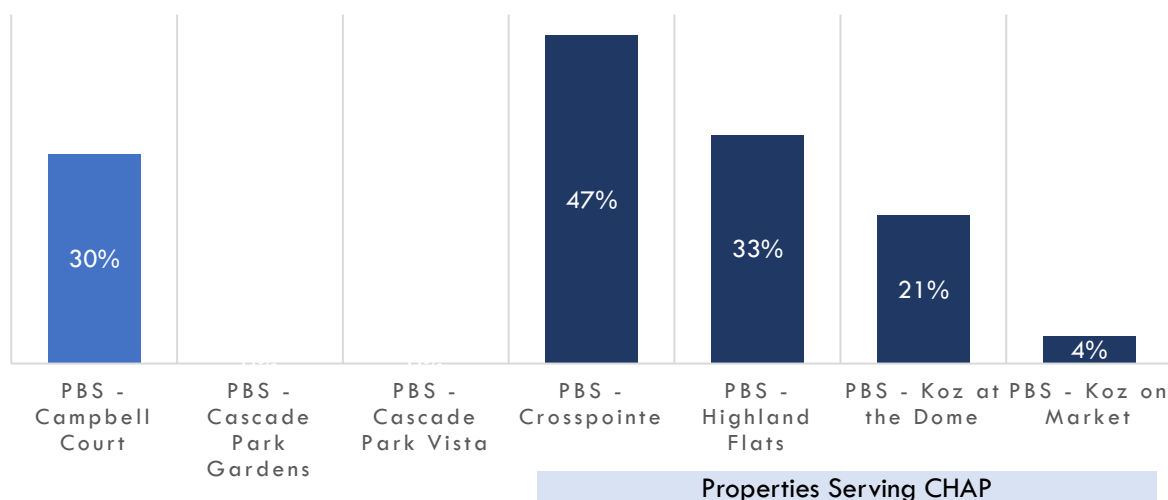
| CHAP Exits                        | % Positive Exit | % Neutral Exit | % Negative Exit | N  |
|-----------------------------------|-----------------|----------------|-----------------|----|
| All CHAP Voucher Holders          | 14%             | 20%            | 66%             | 76 |
| Female                            | 11%             | 21%            | 67%             | 61 |
| Male                              | 27%             | 13%            | 60%             | 15 |
| BIPOC                             | 17%             | 17%            | 66%             | 29 |
| White                             | 10%             | 10%            | 81%             | 21 |
| Unknown/Did not disclose          | 15%             | 31%            | 54%             | 26 |
| BIPOC - Female                    | 13%             | 22%            | 65%             | 23 |
| White - Female                    | 6%              | 12%            | 82%             | 17 |
| BIPOC - Male                      | 33%             | 0%             | 67%             | 6  |
| White - Male                      | 25%             | 0%             | 75%             | 4  |
| African American/Black            | 18%             | 24%            | 59%             | 17 |
| American Indian/Alaska Native     | 0%              | 0%             | 100%            | 2  |
| Asian American                    | 0%              | 0%             | 100%            | 1  |
| Native Hawaiian/Pacific Islander  | 0%              | 0%             | 100%            | 1  |
| White                             | 15%             | 11%            | 74%             | 27 |
| Other/Multiple Races              | 0%              | 0%             | 100%            | 1  |
| Unknown/Did not disclose          | 15%             | 30%            | 56%             | 27 |
| Hispanic BIPOC                    | 0%              | 50%            | 50%             | 2  |
| Hispanic White                    | 33%             | 17%            | 50%             | 6  |
| Hispanic (race not disclosed)     | 0%              | 0%             | 100%            | 1  |
| Non-Hispanic BIPOC                | 15%             | 15%            | 70%             | 20 |
| Non-Hispanic White                | 6%              | 11%            | 83%             | 18 |
| Non-Hispanic (race not disclosed) | 0%              | 67%            | 33%             | 3  |
| Not Single Parent                 | 24%             | 18%            | 59%             | 34 |
| Single Parent Household           | 7%              | 21%            | 71%             | 42 |
| Average Income                    | \$23,246        | \$10,459       | \$10,866        |    |
| Median Income                     | \$21,958        | \$8,796        | \$8,526         |    |

The data presented in the main body of this report demonstrates that CHAP participants are exiting the program worse off than most other households with a HOP voucher. They are more likely to experience a reduction in income while on the program (which may reflect the ability to reduce work hours in order to focus on school), have the highest rate of exiting with a severe market rent burden, and have the highest proportion of negative exits. Additionally, students using tenant-based vouchers were overrepresented in their need for late rent assistance in the fall of 2020 when compared to other THA households using the flat subsidy.



Even more surprising was that CHAP participants using the property-based subsidy had even higher rates of requests for late rent assistance. The property-based subsidy is a deeper subsidy than HOP in that THA pays more than 50% of the payment standard to ensure affordable rents. Despite receiving a deeper subsidy, CHAP participants still indicated a greater need for late rent support. Koz on Market was the only CHAP property with a low number of late rent requests. However, UW Tacoma has shared that during the initial lease up of that property verifying homeless or near-homeless status fell short. As a result, many residents of Koz on Market may not experience the same level of marginalization as those at the three other CHAP properties (it may also reflect differing student demographics, as Koz on Market primarily houses students from UW Tacoma).

### PERCENT OF PBS CLIENTS WHO RECEIVED LATE RENT THROUGH THA OR ANOTHER PROVIDER



The data on CHAP outcomes is deeply concerning. CHAP is intended to ensure students' post-secondary success is not thwarted by homelessness and housing insecurity. Affordable housing would ideally allow them to reduce their non-school workload to give greater attention and time to completing their degree. However, reducing one's workload and income brings with it an exceptional level of risk as the data suggests. These participants are incredibly vulnerable to any negative change in circumstance, and it is unclear just how many participants have entered back into homelessness or disenrolled from college upon being removed from/exiting the program.

Knowing that CHAP is a program intending to serve students whose basic needs are not met, it is important to reflect on whether post-secondary enrollment requirements and academic-based performance metrics are fair and equitable measures of success. How can CHAP incentivize continued post-secondary enrollment and completion while at the same time not punish participants who struggle to make progress, especially student groups that have historically been marginalized in higher education? When students lose rental assistance for not maintaining eligibility, is the program unintentionally recreating the very problem that it is attempting to solve?

*"My financial aid ran out before I got my degree. I could not financially continue school. I got kicked off the program, got behind, and ended back up in a hotel. THA wait lists weren't open. Some sort of collaboration there, resource, or guidance would have helped, like 'Here's what you do so you don't end up homeless again.'"*

### Administrative Challenges

While CHAP eligibility requirements have been modified to allow for greater flexibility, they still require intensive tracking and reporting from the colleges. The education partners must rely on existing institutional data sources/practices which cannot be easily modified to meet the needs of CHAP reporting. Internal tracking at THA is further complicated by the fact that, in addition to 75 voucher holders, there

are nearly 225 additional students spread across four properties. The data on the bulk of CHAP's participants is quite limited, occasionally inaccurate, and cannot be pulled in real time. For instance, determining the exact number of CHAP participants on a given day requires coordination between seven separate parties (two colleges, four properties, and THA) and would likely take nearly a week to compile.

Additionally, though originally envisioned to be a streamlined approach to providing subsidized housing, the PBS portion of the program has demanded a significant amount of administrative time and effort. Inaccurate reporting, landlord-tenant communication problems, safety, and referrals being made by institutions untrained on fair housing practices and landlord-tenant laws have required THA to get involved more than originally anticipated and have placed the college staff in unexpected positions where they serve as a mediator for landlords and tenants when issues arise.

Administering CHAP is complex, not only for internal THA operations but also the program staff at the colleges. TCC has one dedicated staff member to run CHAP. This staff person serves students who are currently housed, students on the waitlist, and students inquiring about the program (roughly 300 students total). UW Tacoma's Office of Student Support and Advocacy has one staff person and two social work interns serving nearly 400 students a year. CHAP participants make up about one quarter of the full case load as this office serves the entire campus and supports students with a variety of needs, not just housing.

Additionally, none of the program staff at the colleges have been formally trained on fair housing laws and local landlord tenant laws. THA does not have a process for onboarding partners and ensuring they are equipped to abide by these regulations and policies. We also do not have an auditing process in place to ensure screening and referral practices are compliant with fair housing guidelines, nor do we currently have the capacity to develop one. We should be mindful that shifting housing-related responsibilities to a non-housing institution bring with it some risk if adequate training and oversight is not provided or available.

It is not surprising that the education partners are concerned about program staffing and sustainability. Administering CHAP requires a unique and specialized skill set that is hard to come by and takes times to develop. Addressing this problem, the BERK evaluation included a recommendation to explore if there is a Coordinated Entry (CE)-connected service provider who could assist with program screening and referral to alleviate the colleges from the housing-specific responsibilities.

## ***Recommendations***

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### ***Recommendation 1: Convert the CHAP Tenant-Based Subsidy to an Income-Based Subsidy***

Unlike THA's general voucher programs, CHAP gives priority to students who are homeless. It is important that we recognize this is a population that may not have enough financial stability to income qualify for PBS units or afford to rent on the private market with a fixed subsidy. It is also a population that has a greater likelihood of having experienced trauma and would benefit from more intensive supports. Lastly, as a population participating in post-secondary education, an income-based subsidy will reduce the need to balance school, work, and family or leave students relying on additional financial aid/private loans to make ends meet. As such and given what we know about HOP's lower lease up success for extremely low-

income households, PIE recommends converting the CHAP HOP subsidy to a traditional income-based voucher.

### *Recommendation 2: Limit Vouchers to Homeless TCC Students*

Should the voucher become an income-based subsidy, PIE staff recommend limiting vouchers to students who are currently homeless, using the definition that has already been established for CHAP:

Definition of homeless: A household that is:

- In an emergency shelter or in a transitional housing facility or living in a place not suitable for human habitation; or,
- Is a client of a case-management program serving the homeless; or,
- Has been discharged or is facing discharge from a public institution (e.g. incarceration, hospital, etc.) without a housing discharge plan; or,
- Is fleeing or attempting to flee domestic violence, has no other residence, and lacks the resources or support networks to obtain other permanent housing.

The previous and following recommendations help to address many of the concerns that THA and TCC were working through in trying to figure out how to better support students who are homeless and without income.

### *Recommendation 3: Designate Property Based Subsidies to Low-Income Students*

If homeless students were able to access income-based vouchers, then PIE staff recommend designating the PBS units to housing insecure/low-income (Pell-eligible) students.

Over the last two years, the education partners have shared that PBS units are not as accessible to homeless students. To qualify for a PBS unit, students must be at or below the 30% AMI limit, but they also must have an income of two times the rent amount. For unemployed or low wage earners, this is a challenge. They are not financially secure enough to lease up. Therefore, an income-based voucher would best serve the most vulnerable population.

On the other hand, we have also received feedback that the definitions of homeless and near-homeless are not broad enough and do not serve students who are trying to avoid becoming homeless. For instance, a student must have documentation of a pending eviction to qualify as near-homeless, yet a student who is not yet evicted and trying to avoid eviction by finding a more affordable place to move to does not qualify to participate in CHAP.

Given these challenges, PIE staff recommend designating PBS units to Pell-eligible students at or below the 30% AMI limit. (Pell-eligibility controls for instances where a student is a dependent as eligibility is based on family income.)

#### *Recommendation 4: Reproportion PBS Units to Better Serve Households with Children*

The PBS model has greatly reduced the stress that students face shopping on the private market. However, the current stock of PBS units is largely made up of studios and one-bedroom apartments. Only 5.5% of PBS units are 2-bedroom. However, many of the people applying to CHAP are adult learners with families. Using TCC's screening application data, between now and March 2020 almost 40% of the homeless and near-homeless students applying to CHAP would qualify for two or more bedrooms.

PIE staff recommend reducing the number of subsidized studio units in order to increase the number of 2+ bedroom units with full amenities (as opposed to kitchenettes) to better serve families.

#### *Recommendation 5: Maintain Time Limits, but Remove Non-Housing Related Program Requirements*

*"I didn't qualify [for CHAP] because the nursing application was down. I had been out [of school] for three quarters [...but] I am following my education plan exactly. The program was not there. I really had to fight to get the voucher."*

*"I find myself taking extra time-consuming classes for the sake of credits that aren't beneficial."*

Though we think of post-secondary education as being composed of two and four-year degree programs, the reality is that most students do not complete a degree within that time. Nationally, the average time it takes to complete an Associate's Degree is roughly *five and half years*. This suggests many students stop out for a period and/or do not attend school full-time.

Providing a fixed time limit of 5 years that is free of non-housing related continued eligibility requirements would allow students greater flexibility to pursue a program on a timeline that best fits their needs and post-secondary/career goals while aligning with the national average time it takes to complete a two-year degree. This is especially important in terms of providing time and flexibility for homeless households to stabilize and experience the effects of the wraparound support provided by their post-secondary institution and/or additional external supports. Also, it would not punish someone who determines college is not the best/most affordable/attainable path for them given their life circumstances. Instead, it affords them some grace to find a path of best fit.

Further, given the inaccessible rental market, we see some students purposefully extending their post-secondary participation due to the fear that they will be unable to afford housing once exited from CHAP. This may impact the accumulation of student loan debt and delay entry into fulltime labor market participation.

Participation in job training and higher education should be *incentivized* rather than serve as a pre-requisite to having one's basic needs met. Through CHAP, post-secondary participation can serve as a method to accelerate access to affordable housing (bypassing the THA waitlist). Maintaining a time limit for the CHAP program reflects the purpose and responsibility of the post-secondary institution to ensure students of any background can obtain a post-secondary credential that will lead to a living wage job. Rather than punish participants for encountering disruptions in their post-secondary path by ending their

assistance, this shifts some of the onus to the education partners. Ensuring participants are leaving the college with improved and marketable skills to participate (and succeed) in the labor market will help accelerate voucher/unit turnover. As a result, PIE staff recommend that THA no longer condition rental assistance on a person's postsecondary enrollment or success. Additionally, we recommend maintaining a 5-year time limit on assistance with vouchers and a limit of 4 lease renewals for property-based subsidies.

## ***Conclusion***

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Together, these recommendations would simplify the administrative burden placed on the colleges and THA staff. These program changes would provide greater flexibility for students coming out of homelessness and put access to basic needs ahead of post-secondary success. They create a path to housing for students with little to no income as well as increased opportunities for students with larger households. Lastly, it calls for greater investment by the post-secondary institutions to develop targeted re-engagement plans and career advising to ensure participants on the program are leaving the program not because of life circumstances that got in the way, but because they have earned a credential and secured entry into a long-term and meaningful career.



## APPENDIX B: CHILDREN’S HOUSING OPPORTUNITY PROGRAM (CHOP)

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In 2012, THA and Washington State Department of Children, Youth, and Families (DCYF) recognized there were not adequate Family Unification Program (FUP) vouchers to serve child welfare system-involved families in need of housing. In response, THA’s board of commissioners committed some of its general federal housing dollars for a local FUP-like program called the Children’s Housing Opportunity Program (CHOP). CHOP is intended to:

- Prevent the need for a child’s foster care placement, i.e. serve families for whom the lack of adequate housing is a primary reason for the imminent placement of a family's child or children in out-of-home care.
- Facilitate a reasonably imminent reunification of a foster child with his or her family (generally within three to six months from the start of receiving housing assistance).

The primary differences between FUP and CHOP are the following:

- The CHOP subsidy is a flat subsidy, like the other HOP programs, whereas FUP family vouchers are income-based.
- The length of CHOP assistance is limited to five years for workable families whereas FUP family assistance is not time limited.
- CHOP assistance is conditioned upon the household’s cooperation with the DCYF’s individualized service or family plan devised.
- CHOP assistance ends if parental rights are terminated.

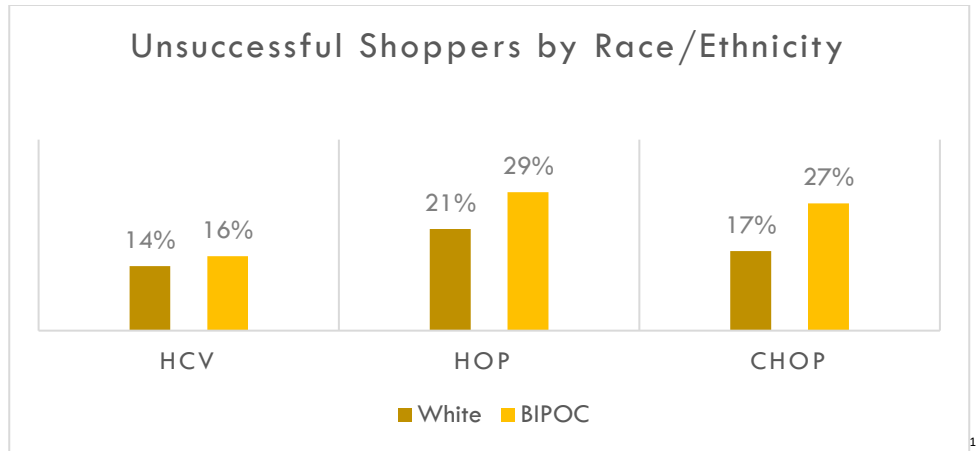
THA funds twenty CHOP subsidies, all set aside for families.

### ***CHOP participants are experiencing inequitable outcomes.***

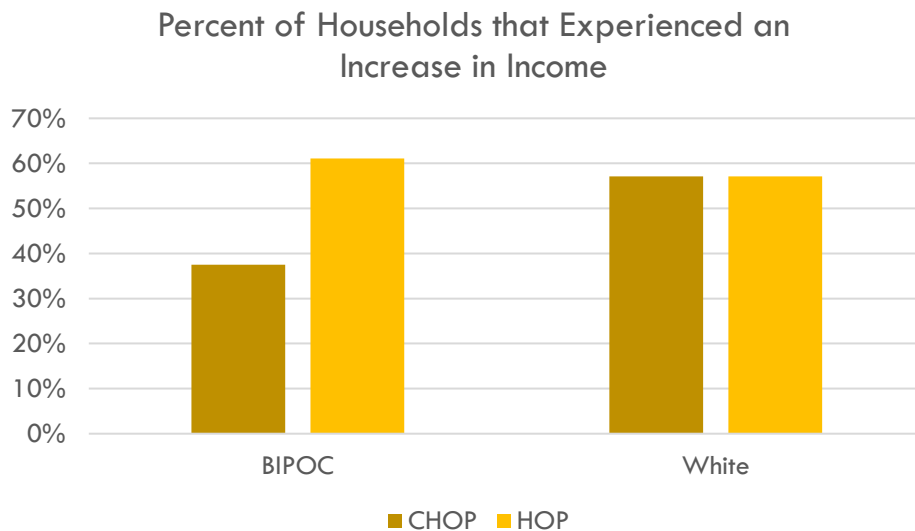
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The following findings are presented in the main report and summarized here for ease of review. It is important to note that, due to the program’s size, the number of CHOP households included in the analysis is small, 27 households. When broken out by demographic characteristics, the populations get even smaller. However, PIE is committed to disaggregating data by race and ethnicity, as a rule. Regardless of population size, the findings show correlations that should be considered in future programmatic decisions.

When comparing lease-up rates to the general HCV population, CHOP participants experience somewhat comparable outcomes with 78% of the population successfully leasing a unit compared to 82% of the HCV population. However, when disaggregated by race and ethnicity, PIE observed that BIPOC-headed households receiving assistance through CHOP were unsuccessful at securing a unit at three times the rate of white-headed households.

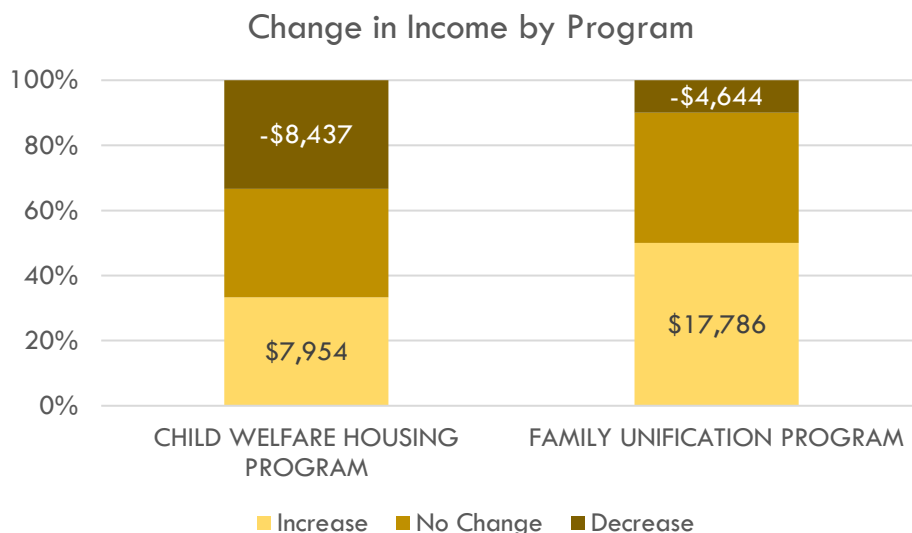


In terms of income gains, CHOP participants were among the lowest proportion of households that experienced an increase in income. In fact, CHOP households were more likely to have experienced an income *decrease* when compared to the general HOP and HCV populations. When disaggregated by race and ethnicity, PIE observed that BIPOC-headed CHOP households were less likely to experience an increase in income compared to their white counterparts on the program. These outcomes could be reflective of more stringent program requirements that have unintended and disproportionate negative impacts on people of color in addition to systemic barriers.

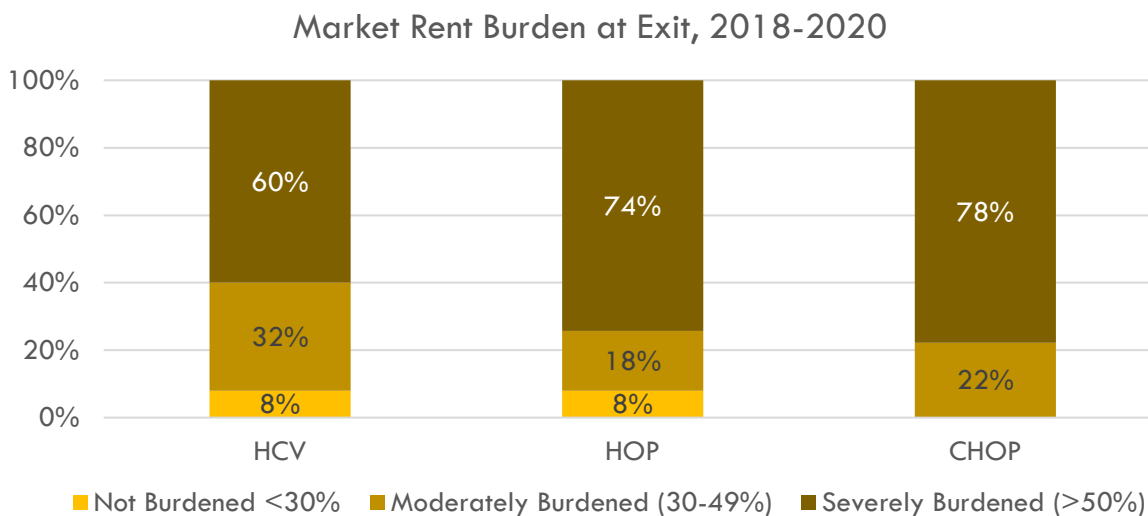


16 CHOP (n=27); HOP (n=889); HCV (n=450)

Comparing CHOP households that have exited to FUP households that have exited, the data shows that FUP households are more likely to experience an increase in income and their average income increase is more than double that of CHOP households.



Finally, CHOP households face greater rent burdens than clients receiving HCV or traditional HOP assistance. When it comes time for households to exit the program, 78% of CHOP participants face a severe market rent burden (paying more than 50% of their income on housing costs) compared to 60% of the general HCV population.



These findings are consistent with previous findings around leasing and income progression: CHOP households are presenting greater barriers and at a disproportionate rate.

## ***Recommendations***

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Like the other HOP programs, CHOP is associated with poorer outcomes when compared to the traditional HCV program. Like CHAP, CHOP targets a special population facing multiple barriers to housing security and stability – families involved with the child welfare system in need of housing support. According to the shopping outcomes, CHOP households may not have enough financial stability to rent on the private market with a fixed subsidy. Further, they have likely experienced trauma and could benefit from deeper and more intensive supports. Finally, DCYF partners have communicated that CHOP is not a fit for all of the families they serve as many need deeper subsidies to successfully secure and maintain housing. For these reasons, PIE recommends shifting the flat CHOP subsidy to an income-based subsidy.

In terms of length of assistance and program requirements, PIE recommends further consultation with its DCYF partners on the particular needs and barriers they observe in their interactions with this client population. DCYF also administers FUP assistance and likely have observations about what can be gleaned from that program and applied to CHOP.

Additional recommendations may follow the community consultation period.



**TACOMA HOUSING AUTHORITY**

**ADMINISTRATIVE SERVICES**



# TACOMA HOUSING AUTHORITY

**DATE:** April 27, 2022

**TO:** THA Board of Commissioners

**FROM:** Sandy Burgess  
Director of Administrative Services

**RE:** Administrative Services Department Bi-Monthly Board Report

*The Administrative Services Department continues to be busy with contracts, safety, security, insurance, asset management, civil rights, compliance, grants, business process improvement, Open Door, supporting THA's IT and moving real estate development projects forward. This month, we are reporting on real estate development projects only.*

## 1. REAL ESTATE DEVELOPMENT

### 1.1. ACTIVE PROJECTS

#### 1.1.1. James Center North/Aviva Crossing

##### **Capital Improvements**

Minor capital repairs have been done on an as needed basis to keep the property functioning. Staff is obtaining scoping estimates for minor sidewalk repairs associated with the larger commercial building (western portion of site) and evaluating the roof. We have had some leaking issues with heavy rainfall. We hope we can repair it rather than needing to replace the entire roof. There may also be some HVAC units in the building that will need to be replaced in the near future as they are getting beyond useful life.

##### **Leasing**

CB Danforth continues to market the available commercial spaces, but COVID has affected leasing prospects. We have LOIs from two new tenants – Rainier Scholars and AIMS, a medical services company, and expect to sign leases within 30 days. The property continues to cash flow well, and with these two new leases, the vacancy rate is down to under 10%.

THA settled a pending litigation claim against Shoebox Northwest (dba Jimmy Johns). The business vacated the space in 2019 before the end of their lease term. THA sought to receive the balance of the rent due per the commercial lease. Instead of going to court and incurring additional expenses and legal costs, we agreed upon a negotiated settlement. The agreement was signed in early April. Funds should be received by the end of the month.

### **Predevelopment**

THA listed the Phase IA and Phase IB parcels for sale in August. THA selected the offers from Koz and Mercy Housing. Staff is negotiating purchase and sale agreements with both organizations. The PSA with Koz should be signed in the next 30 days; the PSA with Mercy should follow shortly thereafter.

JCN has adequate revenue to continue paying the quarterly interest payments on the acquisition loan. THA funds were used to pay the first principal loan installment of \$1 million due in October 2021. THA will be reimbursed from land sale proceeds.

Initial feasibility for the THA site indicates the ability to develop up to 150 units of affordable housing that THA will own. We are proposing a 4% tax credit/bond financial structure with units at 30%, 50% and 60% of AMI, and it currently looks like we can get 142 one-, two- and three-bedroom units on this portion of the site.

#### **1.1.2. New Look (aka Alberta J. Canada)**

Staff has begun the process of decoupling the parking lot from the Alberta J. Canada (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 a nearby location across the street at the Forterra site. The draft parking agreement has been submitted to the investor for approval. Once approval is granted, we will obtain approval from the other lenders. We will need to amend the Ground Lease and provide an easement for parking in the south building of Housing Hilltop. We hope to complete this by the end of June.

### **1.2. DEVELOPMENT PIPELINE PROJECTS**

#### **1.2.1. Hilltop Master Development Plan**

THA conducted its community engagement for the Hilltop in 2019. This resulted in the Hilltop Community Framework Plan. The Plan has been the guiding principle as we finalize the site layout and programming for the buildings, concept and building design. The current design calls for 231 units of housing, approximately 100 parking spaces and 13,000 sq. ft of commercial space.

#### **Housing Hilltop**

- The Design Build contract with Walsh was signed in early October. Walsh has selected SMR Architects to the design partner.
- This project will have 1-, 2- and 3-bedroom apartments.
- This will be a 4% bond transaction; all units are projected to be at 60% of AMI. We expect to submit an application to the WA State Housing Finance Commission in June/July 2022.

- Funding has also been secured from the Amazon Housing Equity Fund. An LOI has been executed for these funds.
- There will be two large buildings on either side of S 11<sup>th</sup>, with parking below. Both buildings will have resident amenities and commercial space. There will be approximately 100 parking spaces. Staff is working toward an end of Q3 2022 financial closing.
- Staff, Walsh & SMR had a design charette with internal staff at the end of September and had a pre-application meeting with City staff in October.
- An interdepartmental team has been formed to review design and program details.
- Schematic Design has been completed. The Site Development permit application was submitted on March 4.
- THA is negotiating an MOU with TUPAC for the 10,000 sq ft performing art space
- THA was awarded \$3 million through the Community Project Funding program sponsored by Representative Derek Kilmer
- THA also received funding from the City of Tacoma/TCRA in the amount of \$1.9MM toward development of the project.
- New construction cost estimates were received April 8 from Walsh. We are evaluating the costs and the impact on the budget.

### **Hilltop Lofts**

The project is being developed by Horizon Housing. Horizon closed on the financing for the project in July 2021. The project is slightly behind schedule but is expected to be ready for occupancy in October 2022. Horizon will be coordinating with THA for the PBVs and Inside Passages (coordinated entry) for the residential lease up. Mr. Mac's and Sam and Terry's will also be returning to the site in October. Siding will be going up shortly. The artwork of Tiffany Hammonds will be seen as part of the exterior façade.





## **Artists**

THA, in collaboration with the other developers along the MLK corridor have been working with local artists to help design the exterior facades and public art at the buildings. We selected two local artists, Jeremy Gregory and Lourdes Jackson, to work with SMR on the exterior facades of the Hilltop buildings. The exterior facades are included at the end of this report along with first floor plans of both buildings.

### **1.2.2. City of Tacoma 311 and Community Mobilization**

THA staff are planning the first community mobilization activity of the year with the Hilltop Action Coalition and The Community Market, along with other partners. The Hilltop Spring Crawl will take place on Saturday, May 7<sup>th</sup> from 10am to 4pm along the MLK corridor. The event will be a business support and community engagement opportunity with local vendors and organizations sharing goods and resources with Hilltop and greater Tacoma residents. Additional activities and entertainment will also be provided by local organizations, including TUPAC, Metro Parks Tacoma, and Tacoma Public Library.

This event will also include an opportunity for community members to provide feedback to THA on the design of the Housing Hilltop buildings as well as other art opportunities.

### **1.2.3. Hilltop Eco District**

Hilltop Neighborhood Association (the eco district) will be sponsoring a financial workshop for Hilltop residents on May 21. HNA is partnering with Financial Beginnings to present the workshop. During Q2 & Q3 we will also be focusing on establishing the governance structure for the organization.

### **1.2.4. Shiloh Baptist Church**

RED staff began 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. Predevelopment funding from Impact Capital and One Pierce to support the work. To date, funding has been secured from the City of Tacoma, Pierce County, 9% tax credits from the WA State Housing Finance Commission and a state legislative earmark. The only funding needed is \$2MM which we hope to get from the Housing Trust Fund. Shiloh applied to the National HOME & HTF NOFA in February through the Department of Commerce. The Department of Commerce is expected to make their funding announcements on April 18, but it has been

delayed twice already. Shiloh also submitted a Community Project Funding request to Rep. Kilmer's office along with companion requests to Senators Murray and Cantwell to help pay for infrastructure related costs of the project. The request is for \$750,000. Assuming funding is awarded, the design team is ready to focus on this project. in order to start construction in early 2023. In total they plan to develop 60 units of new housing in two buildings, one on S I and one on S. 13<sup>th</sup> Street.

### 1.3. ACQUISITIONS

We expect to enter into a Purchase and Sale Agreement with the owner of Highland Court by the end of April. This is a 35-unit building in north Tacoma.

#### REAL ESTATE DEVELOPMENT PROJECT PIPELINE

| Project   | Location                     | Brief Summary  | Est. Timeframe   | Other Notes   |
|---|------------------------------|--|--|---|
| Housing Hilltop                                 | S L St & S 11 <sup>th</sup>  | 231 units;<br>13,500 sq ft<br>commercial<br>space 103<br>parking spaces.<br>Units at 60%<br>AMI  | Financial<br>Closing 9/2022<br>Complete<br>construction<br>Spring 2024 | Funding – 4%<br>bond/tax credit;<br>Amazon<br>Housing Equity<br>Fund  |
| Shiloh<br>Redevelopment                         | S I St. & S 13 <sup>th</sup> | 60 units; units at<br>30% & 50% of<br>AMI  | Start<br>construction Q2<br>2023                                       | THA acting as<br>development<br>consultant  |
| Aviva Crossing<br>(f/k/a James<br>Center North) | 1628 S Mildred               | Commercial<br>Redevelopment<br>~150 units of<br>units at 30%,<br>50% & 60%<br>AMI (THA<br>owned) | Apply for<br>funding 2023<br>Start<br>construction<br>2024             | Large<br>redevelopment<br>site. THA will<br>be selling 4 of<br>the 5 parcels to<br>other developers.<br>Project goal:<br>mixed use,<br>mixed income,<br>transit-oriented<br>development |
| 1500 Hillside                                   | S G & S 15 <sup>th</sup>     | Redevelop site<br>into ~ 50 new<br>units   | TBD  |   |
| 2300 Hillside                                   | S G & S 23 <sup>rd</sup>     | Interior &<br>exterior<br>renovation   | TBD  |   |
| Hillsdale<br>Heights                            | 60 <sup>th</sup> & McKinley  | Looking at<br>partnership with<br>Bridge Meadows<br>for developing                               | Estimate –<br>2025/2026<br>construction<br>start                       |   |

|               |                                      |   |          |  |
|---------------|--------------------------------------|---|----------|--|
|               |                                      | up to 144 units of mixed generational housing with a focus on people adopting from foster care system |          |  |
| Forterra site | MLK & S 11 <sup>th</sup>             | Opportunity to acquire affordable rental property   |          |  |
| Salishan Core | E 44 <sup>th</sup> Street & Portland | Mixed use building  | TBD      |  |
| Acquisitions  |                                      | Acquire naturally occurring affordable housing  | On-going |  |





1 NORTH BUILDING - NE VIEW  
SCALE:



2 NORTH BUILDING - NW VIEW  
SCALE:



3 NORTH BUILDING - SE VIEW  
SCALE:



4 NORTH BUILDING - SW VIEW  
SCALE:



SMR Architects  
117 S. Main St., Suite 400  
Seattle, WA 98104  
PH: 206.623.1104  
FX: 206.623.5285



**WALSH**  
CONSTRUCTION CO.

THA HILLTOP

REVISIONS / NOTES  
NO DATE DESCRIPTION

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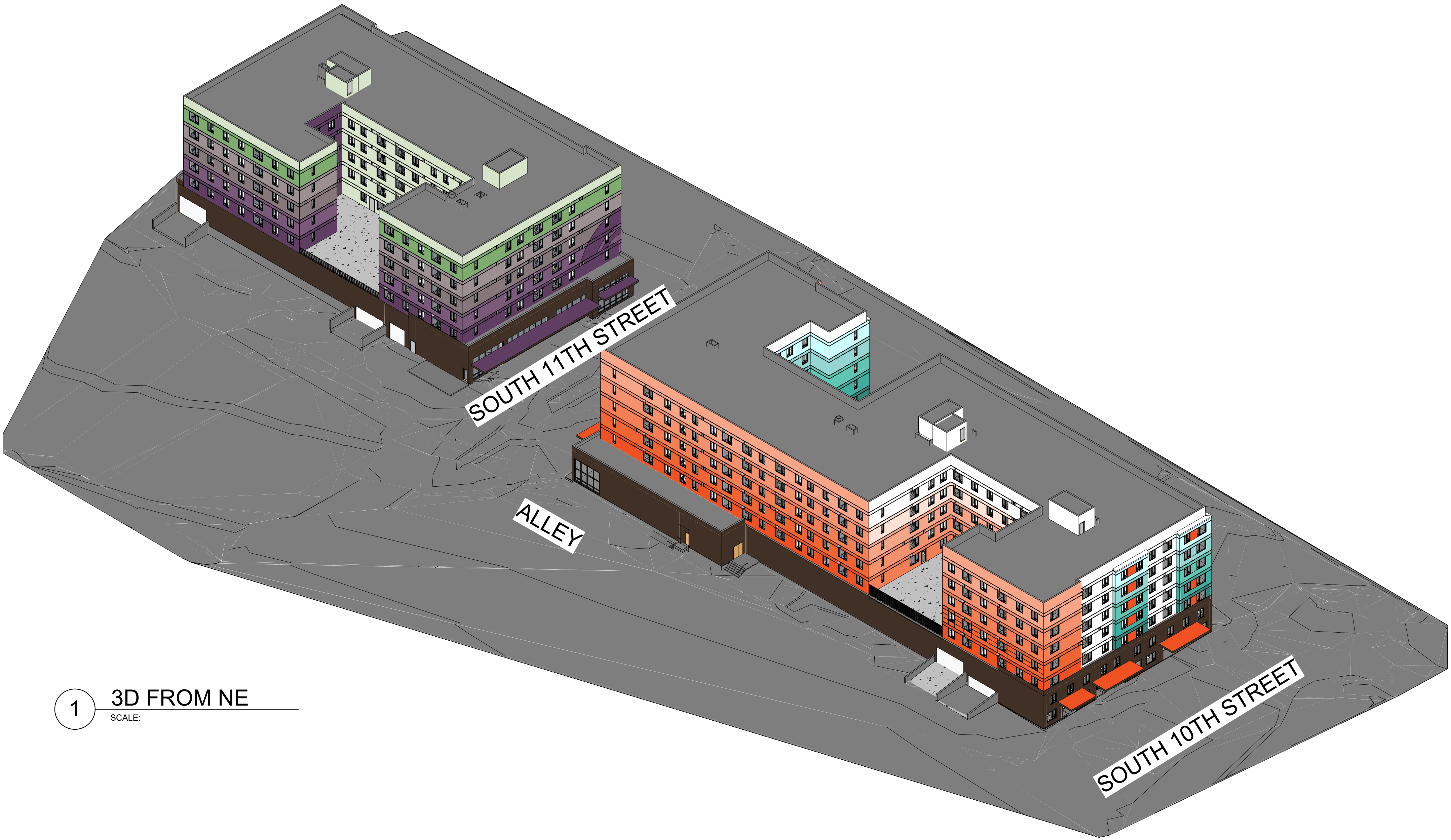
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| JOB NO.    | 21027    |

TITLE  
NORTH BUILDING  
3D VIEWS

SHEET NO.:

G001





1 3D FROM NE  
SCALE:



2 3D FROM SW  
SCALE:



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**WALSH**  
CONSTRUCTION CO.

THA HILLTOP

REVISIONS / NOTES  
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3D VIEWS

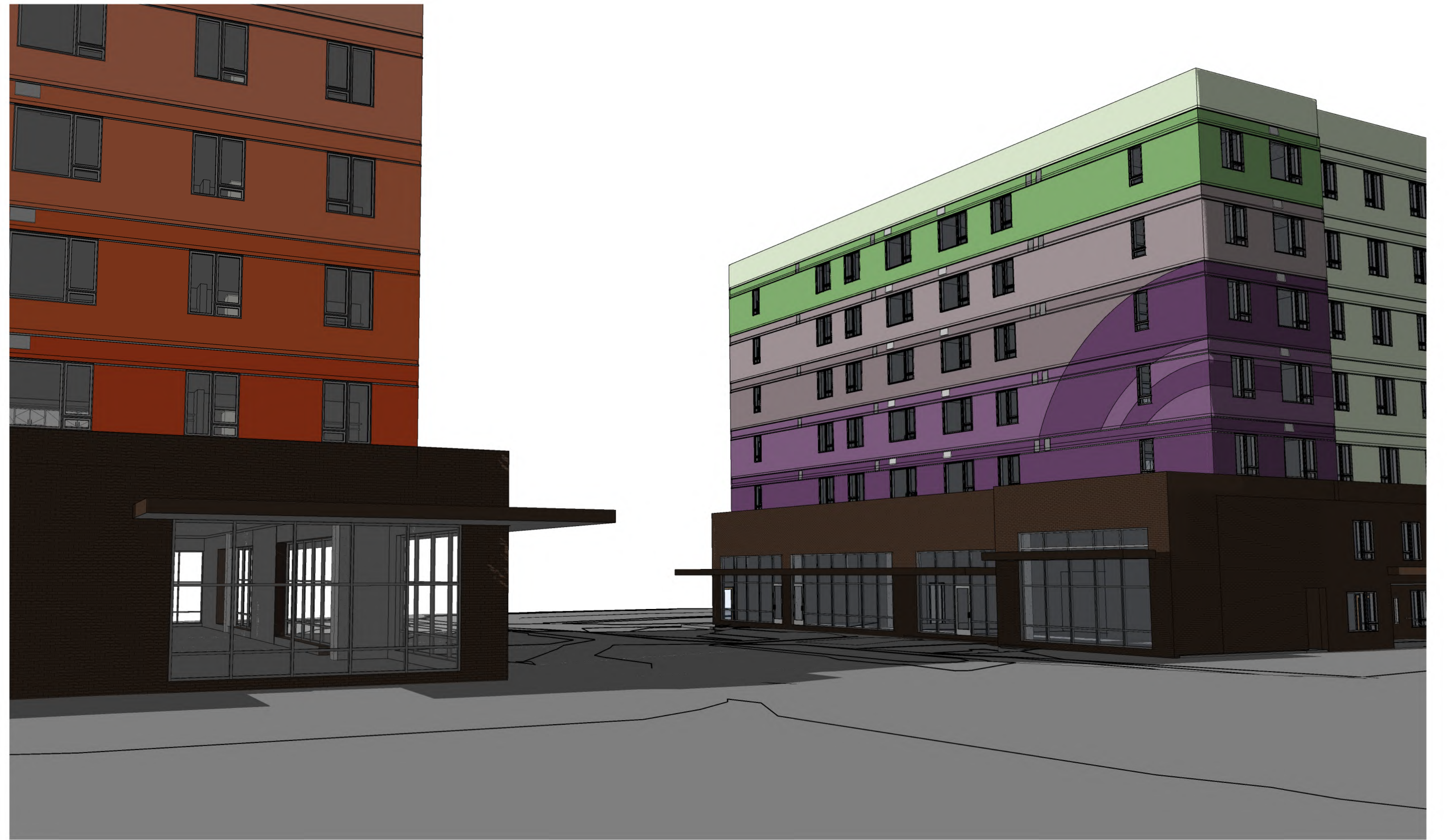
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1 S 11TH ST PERSPECTIVE LOOKING SE  
SCALE:



2 S 11TH ST PERSPECTIVE LOOKING NW  
SCALE:





1 NORTH BLDG - LEVEL 1 COURTYARD LOOKING NE  
SCALE:

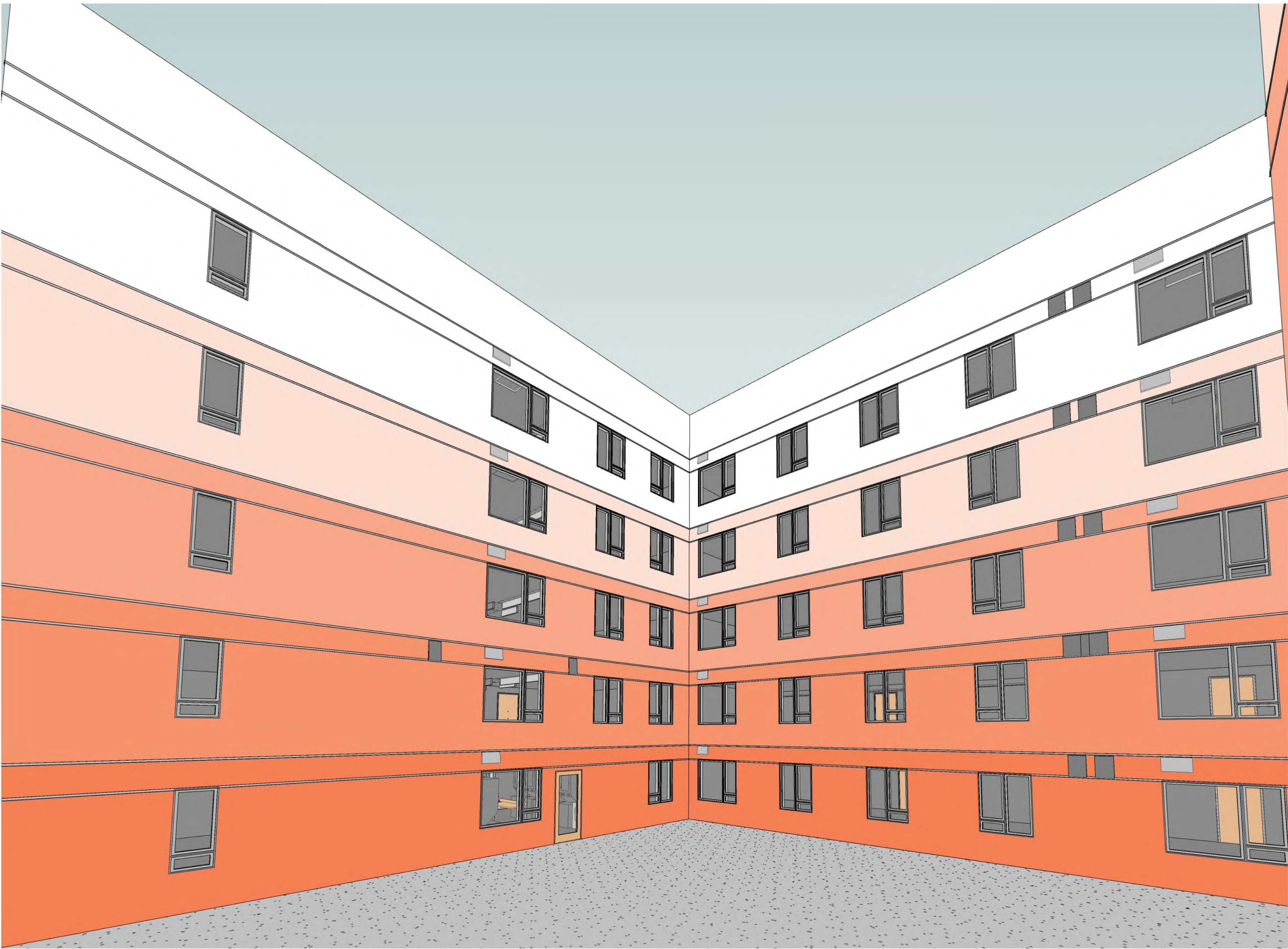


2 NORTH BLDG - LEVEL 1 COURTYARD LOOKING SW  
SCALE:





1 NORTH BLDG - LVL 2 COURTYARD LOOKING NE  
SCALE:



2 NORTH BLDG - LVL 2 COURTYARD LOOKING SW  
SCALE:



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**WALSH**  
CONSTRUCTION CO.

HOUSING HILLTOP - NORTH  
1011 S L ST.  
TACOMA, WA 98405

REVISIONS / NOTES  
NO DATE DESCRIPTION

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| DRAWN      | JA         |
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| JOB NO.    | 21027      |

TITLE  
COURTYARD  
VIEWS-LEVEL 2

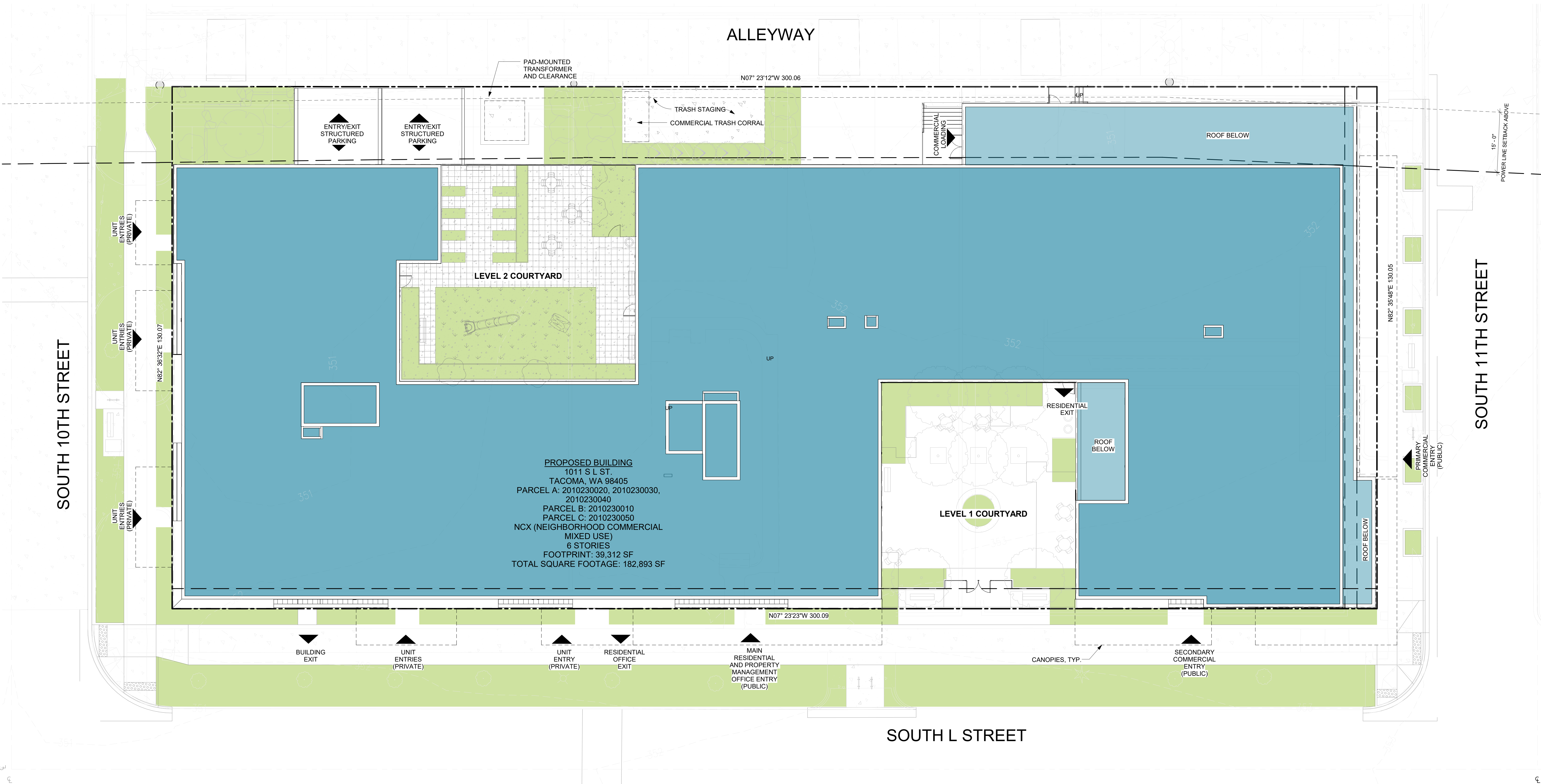
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A004



| Area Schedule (Occupancy) - Building Totals |           |            |
|---|-----------|------------|
| NAME  | OCCUPANCY | AREA       |
| BIKE STORAGE                                | S-2       | 800 SF     |
| CORRIDOR                                    | R-2       | 14,853 SF  |
| COURTYARD                                   | A-3       | 5,629 SF   |
| LAUNDRY                                     | R-2       | 831 SF     |
| LEASE SPACE                                 | B         | 10,497 SF  |
| LOBBY                                       | R-2       | 759 SF     |
| MEP   | S-2       | 3,998 SF   |
| OFFICE                                      | B         | 966 SF     |
| PARKING                                     | S-2       | 19,381 SF  |
| RESIDENTIAL AMENITY                         | A-3       | 1,334 SF   |
| RESIDENTIAL UNITS                           | R-2       | 114,411 SF |
| STAIRS                                      | R-2       | 3,554 SF   |
| STORAGE                                     | S-2       | 4,217 SF   |
| TRASH                                       | S-2       | 1,221 SF   |
| VESTIBULE                                   | R-2       | 405 SF     |
| Grand total:                                | 89        | 182,855 SF |

| SUMMARY UNIT AREA AVERAGES |       |          |            |
|----------------------------|-------|----------|------------|
| UNIT TYPE                  | COUNT | AVG AREA | TOTAL AREA |
| 1-BR UNIT                  | 50    | 515 SF   | 25,741 SF  |
| 2-BR UNIT                  | 29    | 760 SF   | 22,038 SF  |
| 3-BR UNIT                  | 50    | 1,000 SF | 50,021 SF  |
| 3-BR UNIT - LEVEL 1        | 7     | 592 SF   | 4,735 SF   |
| 3-BR UNIT - LEVEL 2        | 7     | 646 SF   | 5,166 SF   |



1 SITE PLAN DIAGRAM  
SCALE: 1" = 10'-0"



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PERMIT # PRE20-0200  
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JOB NO. 21027

TITLE  
SITE PLAN  
DIAGRAM

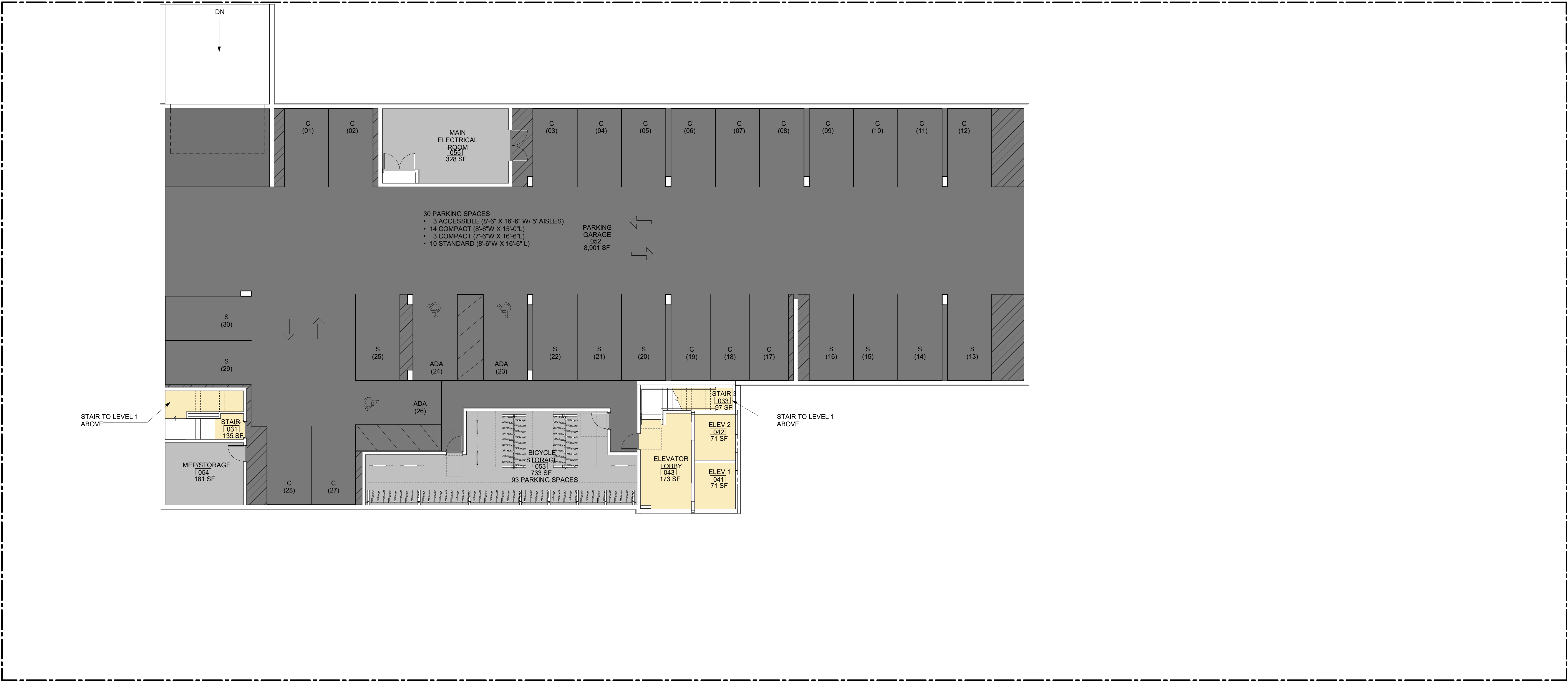
SHEET NO.:

A005



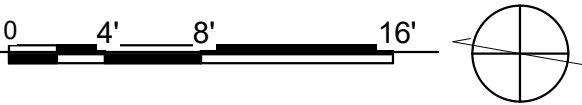
| Area Schedule (Occupancy) - Level P2 |              |           |           |
|--------------------------------------|--------------|-----------|-----------|
| LEVEL                                | NAME         | OCCUPANCY | AREA      |
| P2                                   | BIKE STORAGE | S-2       | 800 SF    |
| P2                                   | MEP          | S-2       | 598 SF    |
| P2                                   | PARKING      | S-2       | 9,998 SF  |
| P2                                   | STAIRS       | R-2       | 280 SF    |
| P2                                   | VESTIBULE    | R-2       | 189 SF    |
| P2: 7                                |              |           | 11,865 SF |
| Grand total: 7                       |              |           | 11,865 SF |

| PROGRAM TYPE       |  |
|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |



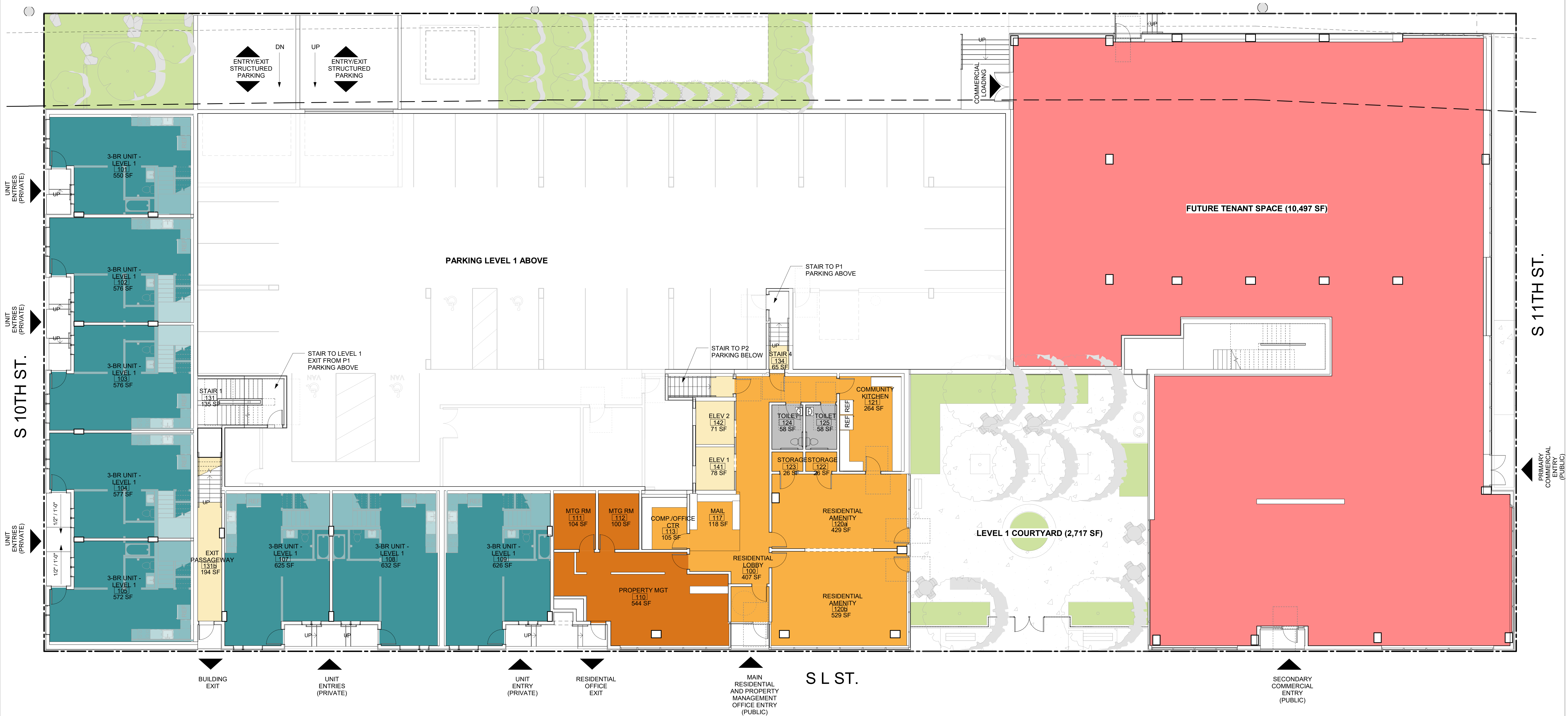
1 PLAN DIAGRAM: PARKING 2

SCALE: 1/8" = 1'-0"



| Area Schedule (Occupancy) - Level 1 |                        |           |           |
|-------------------------------------|------------------------|-----------|-----------|
| LEVEL                               | NAME                   | OCCUPANCY | AREA      |
| LEVEL U1                            |                        |           |           |
| LEVEL U1: 1                         | RESIDENTIAL UNITS: R-2 |           | 5,189 SF  |
| LEVEL U1: 2                         |                        |           | 5,189 SF  |
| LEVEL 1                             |                        |           |           |
| LEVEL 1                             | CORRIDOR               | R-2       | 141 SF    |
| LEVEL 1                             | COURTYARD              | A-3       | 2,717 SF  |
| LEVEL 1                             | LOBBY                  | R-2       | 759 SF    |
| LEVEL 1                             | OFFICE                 | B         | 966 SF    |
| LEVEL 1                             | RESIDENTIAL AMENITY    | A-3       | 1,334 SF  |
| LEVEL 1                             | STAIRS                 | R-2       | 820 SF    |
| LEVEL 1                             | STORAGE                | S-2       | 62 SF     |
| LEVEL 1: 10                         |                        |           | 6,799 SF  |
| LEVEL C1                            |                        |           |           |
| LEVEL C1: 1                         | LEASE SPACE            | B         | 10,497 SF |
| LEVEL C1: 1                         |                        |           | 10,497 SF |
| Grand total: 13                     |                        |           | 22,485 SF |

| PROGRAM TYPE       |  |
|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |



1 PLAN DIAGRAM: LEVEL 1

SCALE: 1/8" = 1'-0"



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| JOB NO.    | 21027      |

TITLE  
PROGRAM  
DIAGRAMS -  
LEVEL 1

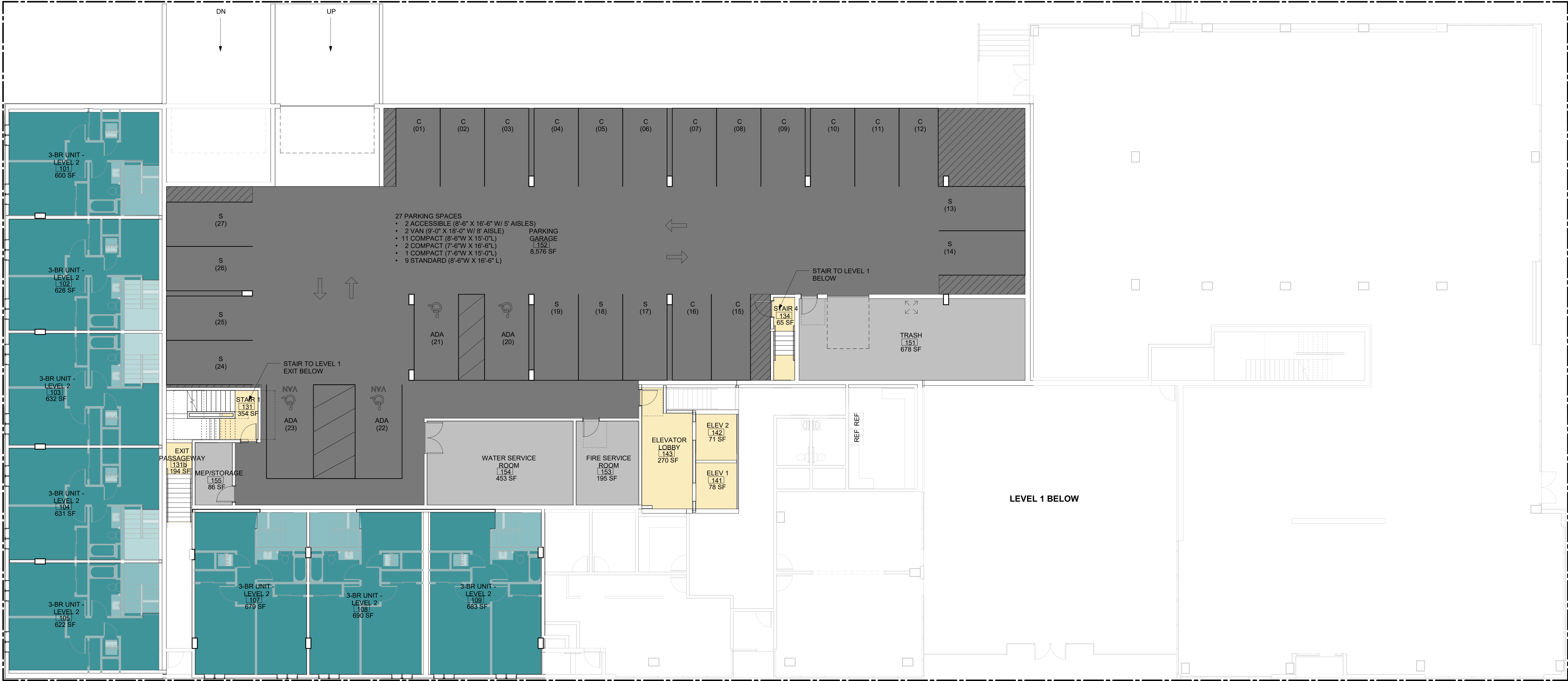
SHEET NO.:

A007



| Area Schedule (Occupancy) - Level P1 |                   |           |           |
|--------------------------------------|-------------------|-----------|-----------|
| LEVEL                                | NAME              | OCCUPANCY | AREA      |
| P1                                   | MEP               | S-2       | 691 SF    |
| P1                                   | PARKING           | S-2       | 9,383 SF  |
| P1                                   | STAIRS            | R-2       | 183 SF    |
| P1                                   | TRASH             | S-2       | 746 SF    |
| P1                                   | VESTIBULE         | R-2       | 216 SF    |
| P1: 6                                |                   |           | 11,218 SF |
| LEVEL U2                             |                   |           |           |
| LEVEL U2                             | RESIDENTIAL UNITS | R-2       | 5,571 SF  |
| LEVEL U2: 2                          |                   |           | 5,571 SF  |
| Grand total: 8                       |                   |           | 16,789 SF |

| PROGRAM TYPE       |  |
|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |



1 PLAN DIAGRAM: PARKING 1

SCALE: 1/8" = 1'-0"



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| ISSUE DATE | 04/14/22   |
| JOB NO.    | 21027      |

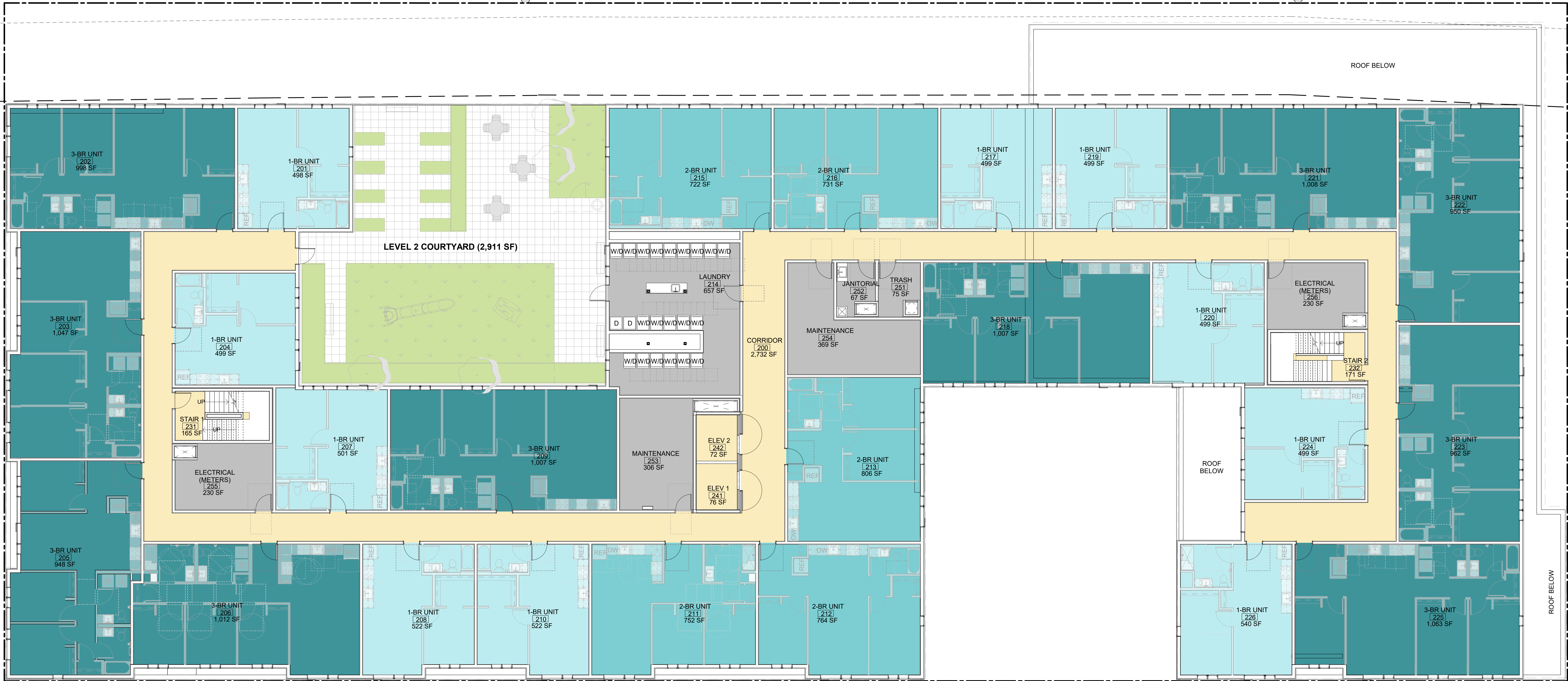
TITLE  
PROGRAM  
DIAGRAMS -  
LEVEL P1

SHEET NO.:

A008

| Area Schedule (Occupancy) - Level 2 |                   |           |           |
|-------------------------------------|-------------------|-----------|-----------|
| LEVEL                               | NAME              | OCCUPANCY | AREA      |
| LEVEL 2                             |                   |           |           |
| LEVEL 2                             | CORRIDOR          | R-2       | 2,943 SF  |
| LEVEL 2                             | COURTYARD         | A-3       | 2,911 SF  |
| LEVEL 2                             | LAUNDRY           | R-2       | 831 SF    |
| LEVEL 2                             | MEP               | S-2       | 517 SF    |
| LEVEL 2                             | RESIDENTIAL UNITS | R-2       | 20,066 SF |
| LEVEL 2                             | STAIRS            | R-2       | 411 SF    |
| LEVEL 2                             | STORAGE           | S-2       | 831 SF    |
| LEVEL 2                             | TRASH             | S-2       | 95 SF     |
| LEVEL 2: 15                         |                   |           | 28,604 SF |
| Grand total: 15                     |                   |           | 28,604 SF |

| PROGRAM TYPE       |  |
|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |



1 PLAN DIAGRAM: LEVEL 2  
SCALE: 1/8" = 1'-0"



| Area Schedule (Occupancy) - Levels 3-6 |                   |           |           |
|--|-------------------|-----------|-----------|
| LEVEL                                  | NAME              | OCCUPANCY | AREA      |
| LEVEL 3                                |                   |           |           |
| LEVEL 3                                | CORRIDOR          | R-2       | 2,943 SF  |
| LEVEL 3                                | MEP               | S-2       | 517 SF    |
| LEVEL 3                                | RESIDENTIAL UNITS | R-2       | 20,896 SF |
| LEVEL 3                                | STAIRS            | R-2       | 411 SF    |
| LEVEL 3                                | STORAGE           | S-2       | 831 SF    |
| LEVEL 3                                | TRASH             | S-2       | 95 SF     |
| LEVEL 3: 11                            |                   |           | 25,693 SF |
| LEVEL 4                                |                   |           |           |
| LEVEL 4                                | CORRIDOR          | R-2       | 2,943 SF  |
| LEVEL 4                                | MEP               | S-2       | 517 SF    |
| LEVEL 4                                | RESIDENTIAL UNITS | R-2       | 20,896 SF |
| LEVEL 4                                | STAIRS            | R-2       | 411 SF    |
| LEVEL 4                                | STORAGE           | S-2       | 831 SF    |
| LEVEL 4                                | TRASH             | S-2       | 95 SF     |
| LEVEL 4: 11                            |                   |           | 25,693 SF |

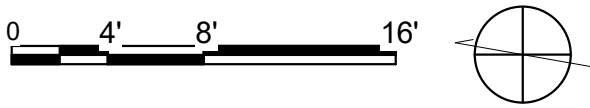
| Area Schedule (Occupancy) - Levels 3-6 |                   |           |            |
|--|-------------------|-----------|------------|
| LEVEL                                  | NAME              | OCCUPANCY | AREA       |
| LEVEL 5                                |                   |           |            |
| LEVEL 5                                | CORRIDOR          | R-2       | 2,943 SF   |
| LEVEL 5                                | MEP               | S-2       | 517 SF     |
| LEVEL 5                                | RESIDENTIAL UNITS | R-2       | 20,896 SF  |
| LEVEL 5                                | STAIRS            | R-2       | 411 SF     |
| LEVEL 5                                | STORAGE           | S-2       | 831 SF     |
| LEVEL 5                                | TRASH             | S-2       | 95 SF      |
| LEVEL 5: 11                            |                   |           | 25,693 SF  |
| LEVEL 6                                |                   |           |            |
| LEVEL 6                                | CORRIDOR          | R-2       | 2,943 SF   |
| LEVEL 6                                | MEP               | S-2       | 517 SF     |
| LEVEL 6                                | RESIDENTIAL UNITS | R-2       | 20,896 SF  |
| LEVEL 6                                | STAIRS            | R-2       | 411 SF     |
| LEVEL 6                                | STORAGE           | S-2       | 831 SF     |
| LEVEL 6                                | TRASH             | S-2       | 95 SF      |
| LEVEL 6: 11                            |                   |           | 25,693 SF  |
| ROOF                                   |                   |           |            |
| ROOF                                   | MEP               | S-2       | 127 SF     |
| ROOF                                   | STAIRS            | R-2       | 213 SF     |
| ROOF: 2                                |                   |           | 340 SF     |
| Grand total: 46                        |                   |           | 103,112 SF |

- PROGRAM TYPE
- 1-BDRM
  - 2-BDRM
  - 3-BDRM
  - CIRCULATION
  - MEP/STORAGE
  - OFFICES
  - PARKING
  - RESIDENTIAL COMMON
  - RETAIL



2 PLAN DIAGRAM: LEVELS 3-6

SCALE: 1/8" = 1'-0"



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TITLE  
PROGRAM  
DIAGRAMS -  
LEVELS 3-6

SHEET NO.:

A011





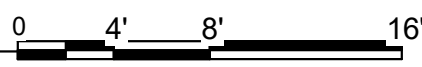
PROGRAM TYPE

- 1-BDRM
- 2-BDRM
- 3-BDRM
- CIRCULATION
- MEP/STORAGE
- OFFICES
- PARKING
- RESIDENTIAL COMMON
- RETAIL

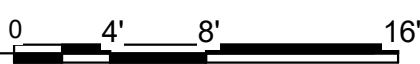
| Area Schedule (Occupancy) - Building Totals |           |            |  |
|---|-----------|------------|--|
| NAME  | OCCUPANCY | AREA       |  |
| BIKE STORAGE                                | S-2       | 800 SF     |  |
| CORRIDOR                                    | R-2       | 14,853 SF  |  |
| COURTYARD                                   | A-3       | 5,629 SF   |  |
| LAUNDRY                                     | R-2       | 831 SF     |  |
| LEASE SPACE                                 | B         | 10,497 SF  |  |
| LOBBY                                       | R-2       | 759 SF     |  |
| MEP   | S-2       | 3,998 SF   |  |
| OFFICE                                      | B         | 966 SF     |  |
| PARKING                                     | S-2       | 19,381 SF  |  |
| RESIDENTIAL AMENITY                         | A-3       | 1,334 SF   |  |
| RESIDENTIAL UNITS                           | R-2       | 114,411 SF |  |
| STAIRS                                      | R-2       | 3,554 SF   |  |
| STORAGE                                     | S-2       | 4,217 SF   |  |
| TRASH                                       | S-2       | 1,221 SF   |  |
| VESTIBULE                                   | R-2       | 405 SF     |  |
| Grand total:                                |           | 182,855 SF |  |

| SUMMARY UNIT AREA AVERAGES |       |          |            |
|----------------------------|-------|----------|------------|
| UNIT TYPE                  | COUNT | AVG AREA | TOTAL AREA |
| 1-BR UNIT                  | 50    | 915 SF   | 25,741 SF  |
| 2-BR UNIT                  | 29    | 760 SF   | 22,038 SF  |
| 3-BR UNIT                  | 50    | 1,000 SF | 50,021 SF  |
| 3-BR UNIT - LEVEL 1        | 7     | 592 SF   | 4,735 SF   |
| 3-BR UNIT - LEVEL 2        | 7     | 646 SF   | 5,166 SF   |

2 DIAGRAM: SECTION LOOKING NORTH NORTH RAMP  
SCALE: 1/8" = 1'-0"



1 DIAGRAM: BUILDING SECTION N-S  
SCALE: 1/8" = 1'-0"



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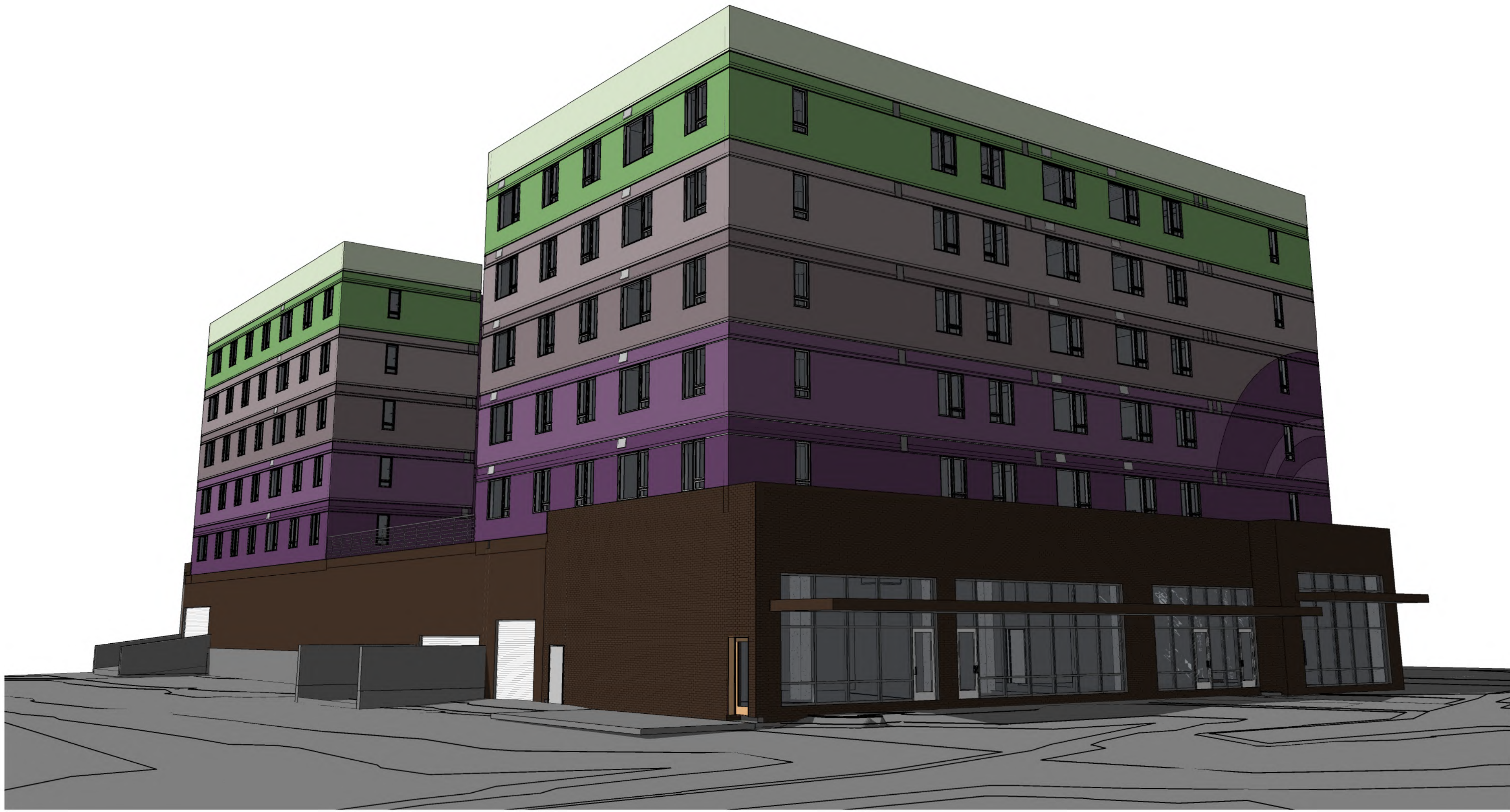
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TITLE  
PROGRAM  
DIAGRAMS -  
SECTIONS

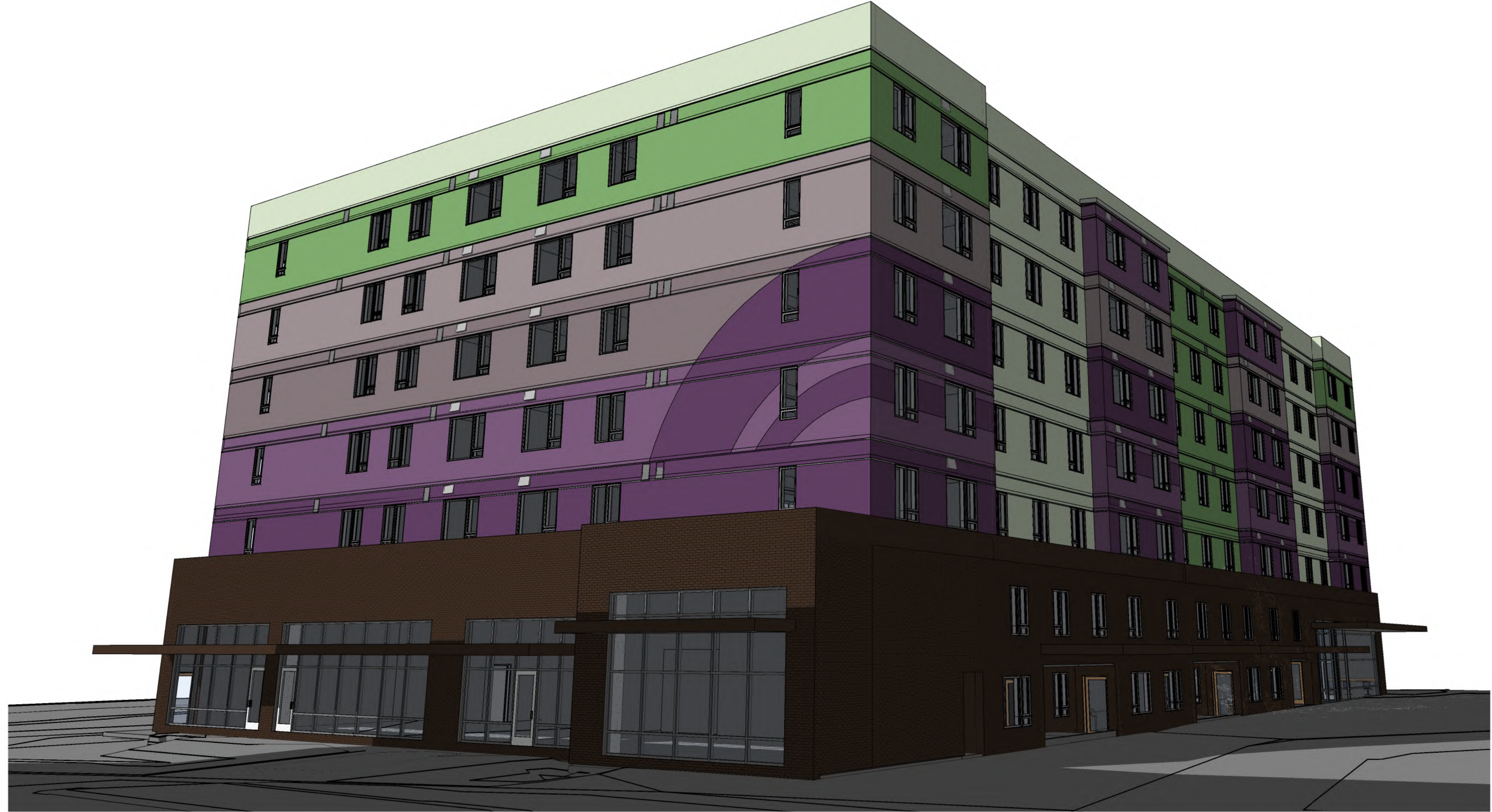
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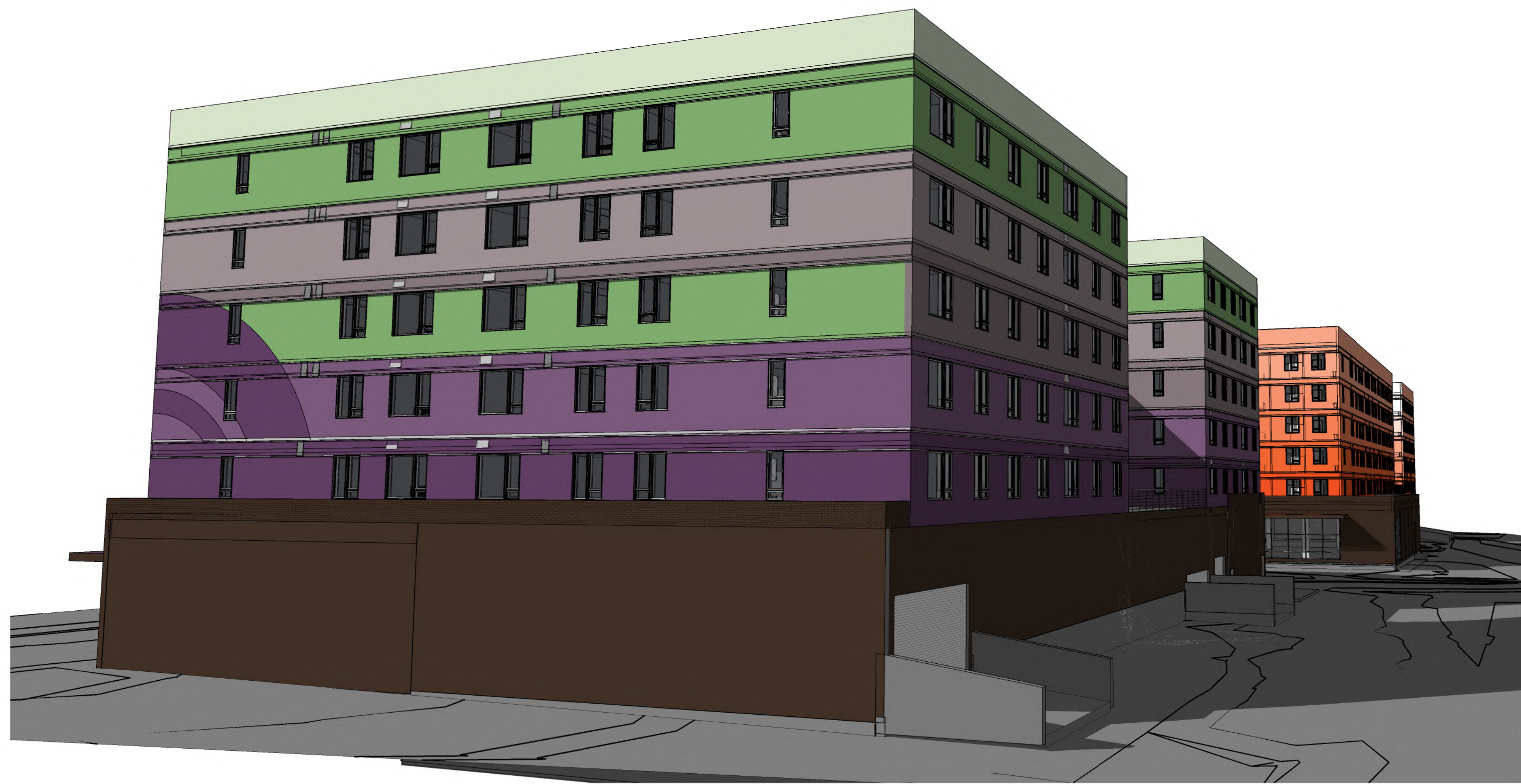




1 SOUTH BUILDING - NE VIEW  
SCALE:



2 SOUTH BUILDING - NW VIEW  
SCALE:



3 SOUTH BUILDING - SE VIEW  
SCALE:



4 SOUTH BUILDING - SW VIEW  
SCALE:



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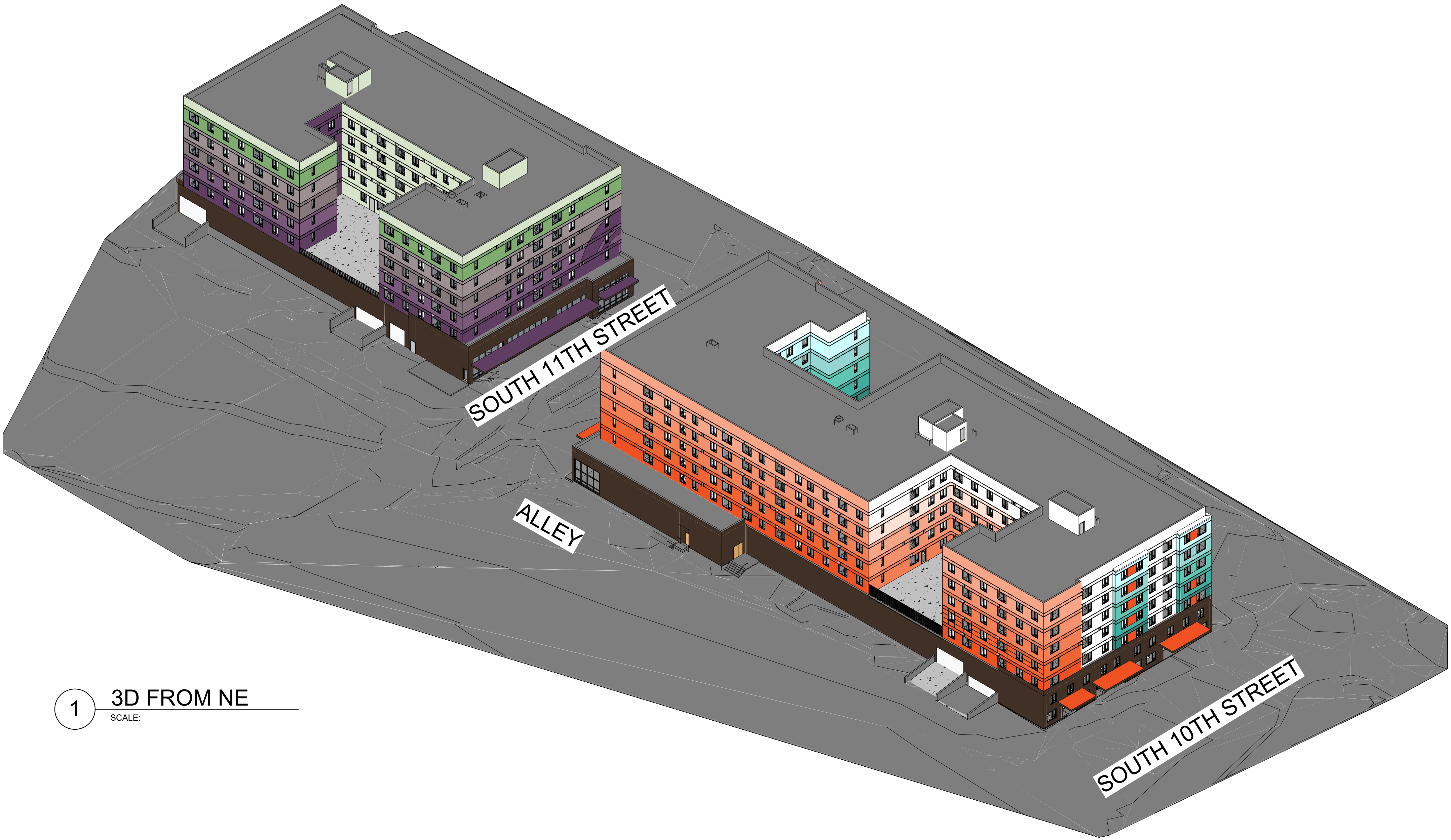
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| PERMIT #   |          |
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| CHECKED    | JW       |
| ISSUE DATE | 02/08/22 |
| JOB NO.    | 21027    |

TITLE  
SOUTH BUILDING  
3D VIEWS

SHEET NO.:

G002





1 3D FROM NE  
SCALE:



2 3D FROM SW  
SCALE:



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| JOB NO.    | 21027    |

TITLE  
3D VIEWS

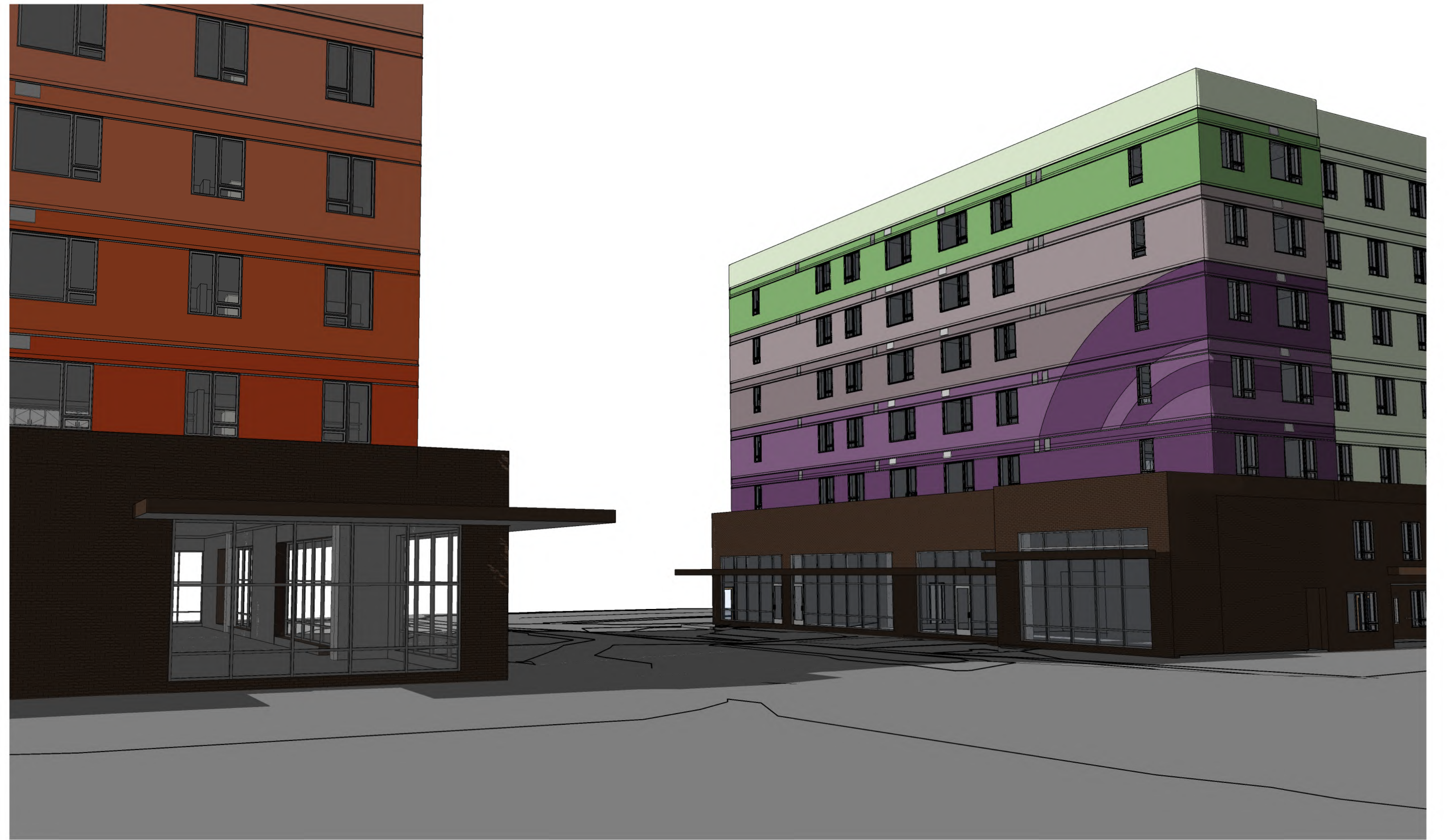
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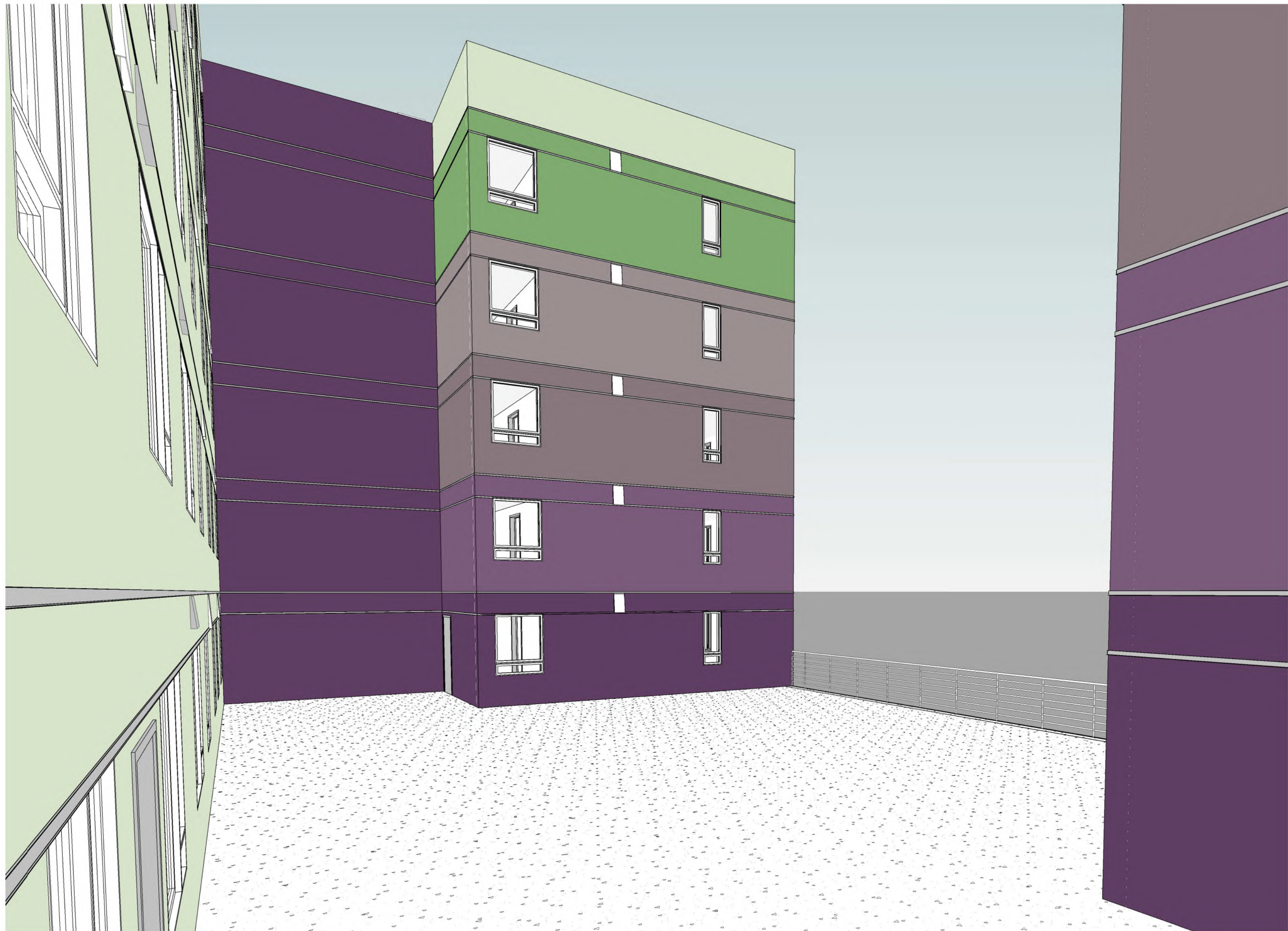


1 S 11TH ST PERSPECTIVE LOOKING SE  
SCALE:



2 S 11TH ST PERSPECTIVE LOOKING NW  
SCALE:





1 SOUTH BLDG - COURTYARD LOOKING NE  
SCALE:



2 SOUTH BLDG - COURTYARD LOOKING SW  
SCALE:



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| ISSUE DATE | 03/23/22   |
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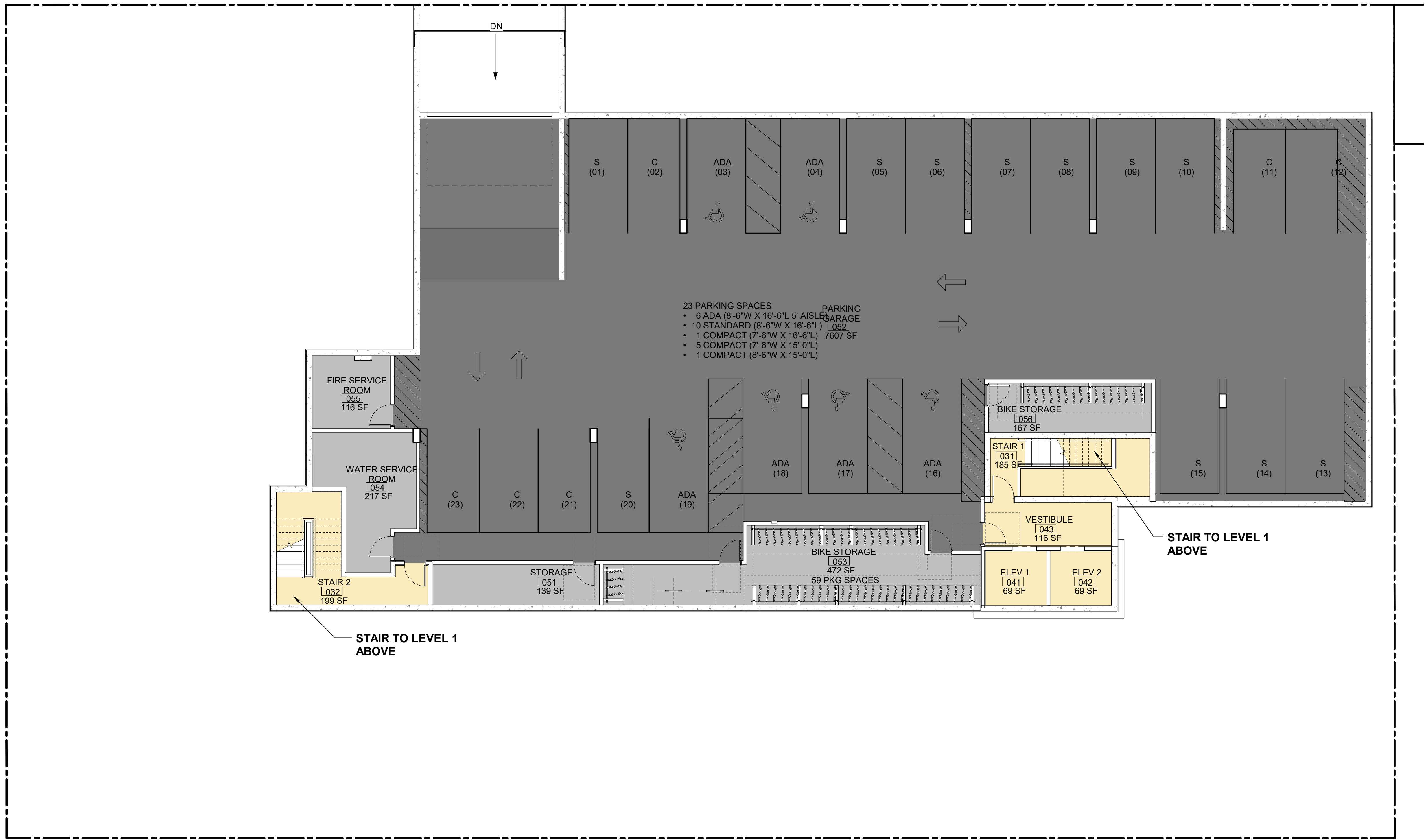
TITLE  
COURTYARD  
PERSPECTIVES

SHEET NO.:

A004







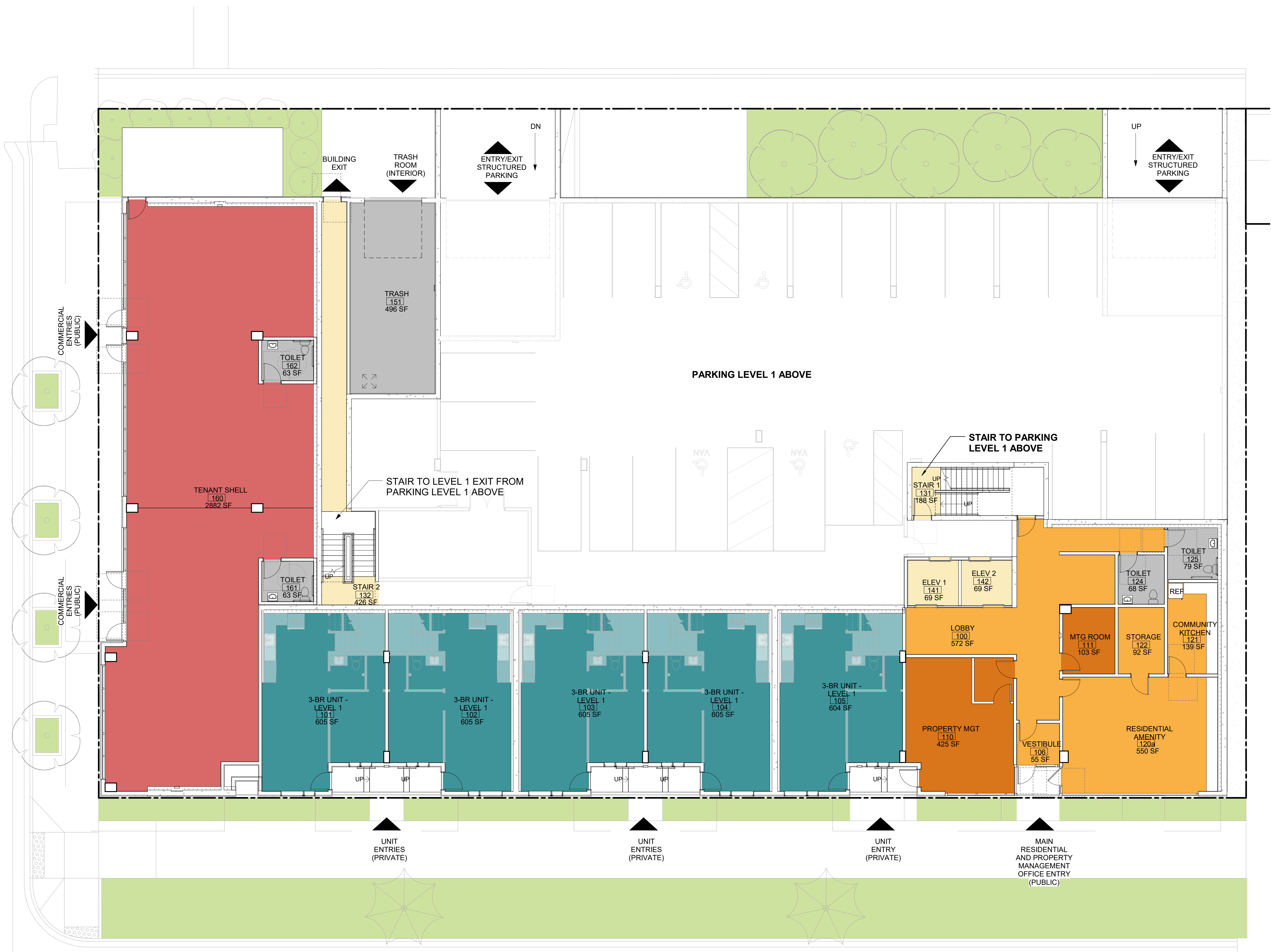
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|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |

| Area Schedule (Occupancy) - Level P2 |              |           |          |
|--------------------------------------|--------------|-----------|----------|
| LEVEL                                | NAME         | OCCUPANCY | AREA     |
| P2                                   | BIKE STORAGE | S-2       | 897 SF   |
| P2                                   | MEP          | S-2       | 389 SF   |
| P2                                   | PARKING      | S-2       | 8390 SF  |
| P2                                   | STAIRS       | R-2       | 365 SF   |
| P2                                   | VESTIBULE    | R-2       | 138 SF   |
| P2: 7                                |              |           | 10180 SF |
| Grand total: 7                       |              |           | 10180 SF |

1 PLAN DIAGRAM: PARKING LEVEL 2  
SCALE: 1/8" = 1'-0"





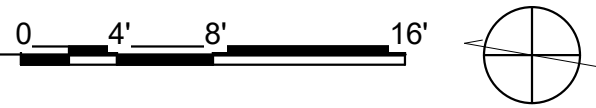


PROGRAM TYPE

- 1-BDRM
- 2-BDRM
- 3-BDRM
- CIRCULATION
- MEP/STORAGE
- OFFICES
- PARKING
- RESIDENTIAL COMMON
- RETAIL

| Area Schedule (Occupancy) - Level 1 |                     |           |          |
|-------------------------------------|---------------------|-----------|----------|
| LEVEL                               | NAME                | OCCUPANCY | AREA     |
| LEVEL U1                            |                     |           |          |
| LEVEL U1                            | RESIDENTIAL UNITS   | R-2       | 3447 SF  |
| LEVEL U1: 1                         |                     |           | 3447 SF  |
| LEVEL 1                             | CORRIDOR            | R-2       | 279 SF   |
| LEVEL 1                             | LEASE SPACE         | B         | 3328 SF  |
| LEVEL 1                             | LOBBY               | R-2       | 892 SF   |
| LEVEL 1                             | OFFICE              | B         | 576 SF   |
| LEVEL 1                             | RESIDENTIAL AMENITY | A-3       | 776 SF   |
| LEVEL 1                             | STAIRS              | R-2       | 216 SF   |
| LEVEL 1                             | STORAGE             | S-2       | 104 SF   |
| LEVEL 1                             | TRASH               | S-2       | 540 SF   |
| LEVEL 1: 9                          |                     |           | 6712 SF  |
| Grand total: 10                     |                     |           | 10160 SF |

1 PLAN DIAGRAM: LEVEL 1  
SCALE: 1/8" = 1'-0"



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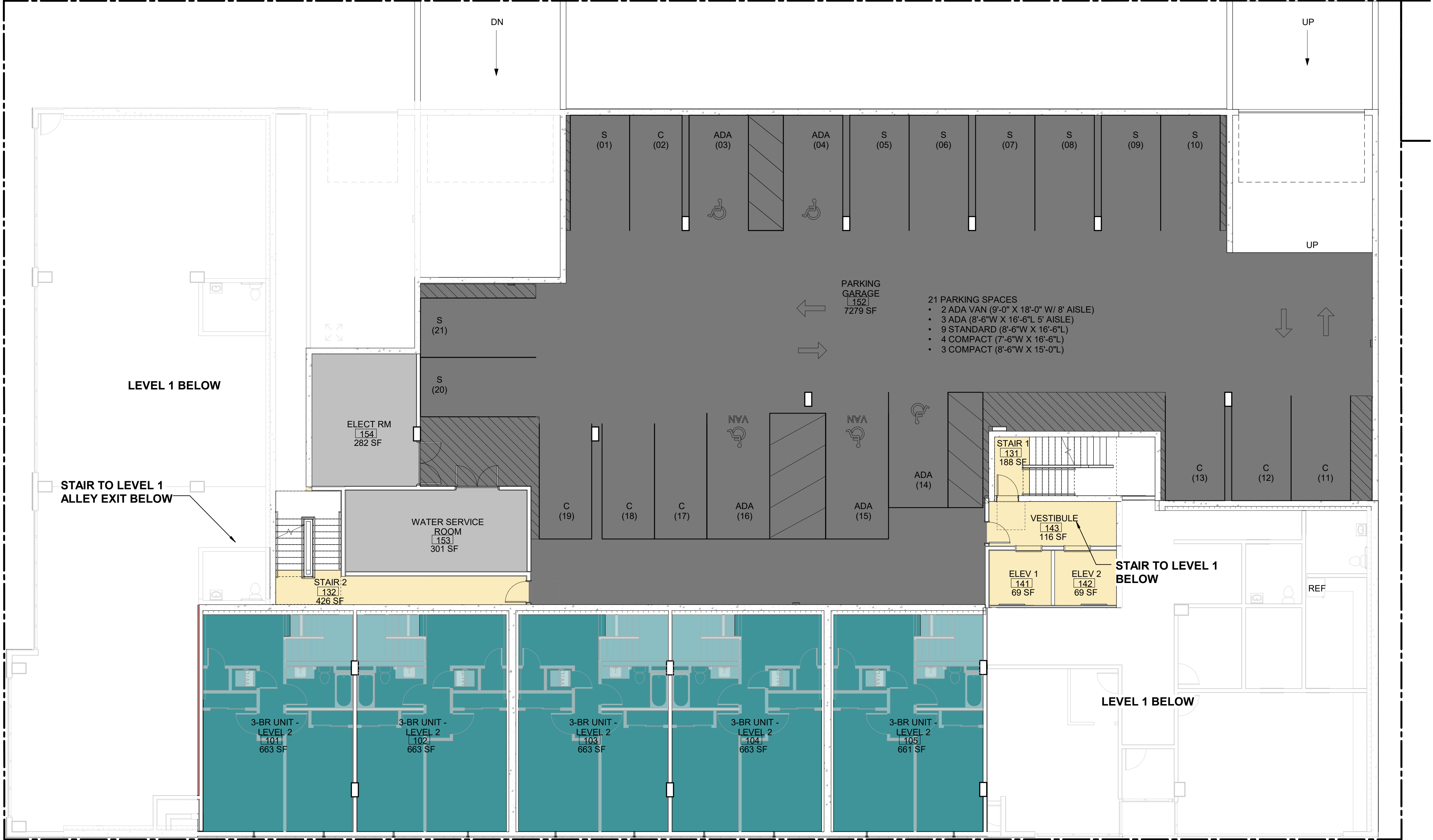
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JOB NO. 21027

TITLE  
PROGRAM  
DIAGRAMS -  
LEVEL 1

SHEET NO.:

A007

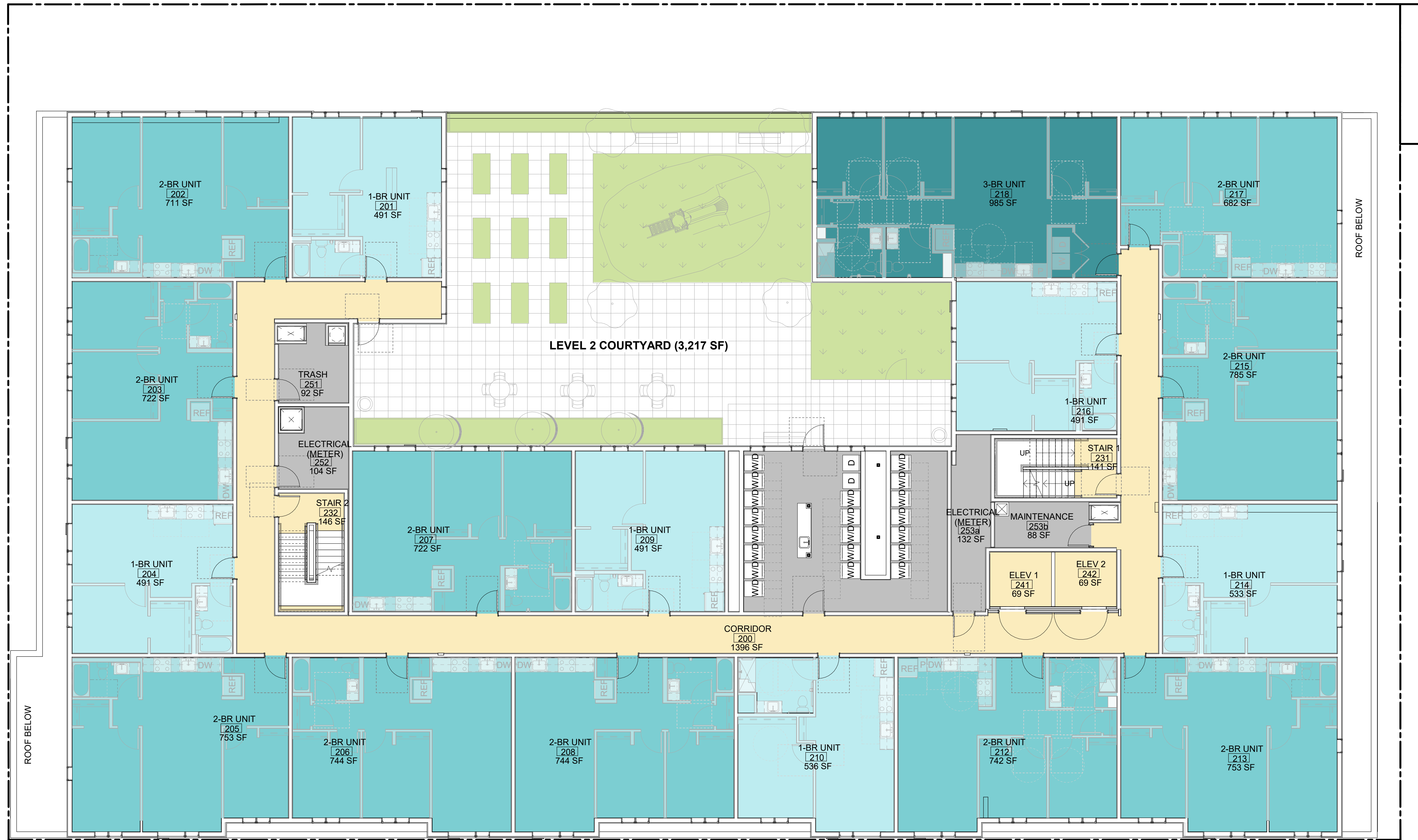


| Area Schedule (Occupancy) - Level P1 |                   |           |          |
|--------------------------------------|-------------------|-----------|----------|
| LEVEL                                | NAME              | OCCUPANCY | AREA     |
| P1                                   | MEP               | S-2       | 634 SF   |
| P1                                   | PARKING           | S-2       | 8294 SF  |
| P1                                   | STAIRS            | R-2       | 514 SF   |
| P1                                   | VESTIBULE         | R-2       | 137 SF   |
| P1: 5                                |                   |           | 9579 SF  |
| LEVEL U2                             |                   |           |          |
| LEVEL U2                             | RESIDENTIAL UNITS | R-2       | 3684 SF  |
| LEVEL U2: 1                          |                   |           |          |
| Grand total: 6                       |                   |           | 13263 SF |

1 PLAN DIAGRAM: PARKING LEVEL P1  
SCALE: 1/8" = 1'-0"







| PROGRAM TYPE       |  |
|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |

| Area Schedule (Occupancy) - Level 2 |                   |           |          |
|-------------------------------------|-------------------|-----------|----------|
| LEVEL                               | NAME              | OCCUPANCY | AREA     |
| LEVEL 2                             | CORRIDOR          | R-2       | 1575 SF  |
| LEVEL 2                             | COURTYARD         | A-3       | 3217 SF  |
| LEVEL 2                             | LAUNDRY           | R-2       | 772 SF   |
| LEVEL 2                             | MEP               | S-2       | 287 SF   |
| LEVEL 2                             | RESIDENTIAL UNITS | R-2       | 12299 SF |
| LEVEL 2                             | STAIRS            | R-2       | 362 SF   |
| LEVEL 2                             | STORAGE           | S-2       | 114 SF   |
| LEVEL 2                             | TRASH             | S-2       | 134 SF   |
| LEVEL 2: 11                         |                   |           | 18760 SF |
| Grand total: 11                     |                   |           | 18760 SF |

1 PLAN DIAGRAM: LEVEL 2  
SCALE: 1/8" = 1'-0"





| PROGRAM TYPE       |  |
|--------------------|--|
| 1-BDRM             |  |
| 2-BDRM             |  |
| 3-BDRM             |  |
| CIRCULATION        |  |
| MEP/STORAGE        |  |
| OFFICES            |  |
| PARKING            |  |
| RESIDENTIAL COMMON |  |
| RETAIL             |  |

| Area Schedule (Occupancy) - Levels 3-6 |                   |           |          |
|--|-------------------|-----------|----------|
| LEVEL                                  | NAME              | OCCUPANCY | AREA     |
| LEVEL 3                                |                   |           |          |
| LEVEL 3                                | CORRIDOR          | R-2       | 1575 SF  |
| LEVEL 3                                | MEP               | S-2       | 287 SF   |
| LEVEL 3                                | RESIDENTIAL UNITS | R-2       | 13072 SF |
| LEVEL 3                                | STAIRS            | R-2       | 362 SF   |
| LEVEL 3                                | STORAGE           | S-2       | 114 SF   |
| LEVEL 3                                | TRASH             | S-2       | 134 SF   |
| LEVEL 3: 9                             |                   |           | 15543 SF |
| LEVEL 4                                |                   |           |          |
| LEVEL 4                                | CORRIDOR          | R-2       | 1575 SF  |
| LEVEL 4                                | MEP               | S-2       | 287 SF   |
| LEVEL 4                                | RESIDENTIAL UNITS | R-2       | 13072 SF |
| LEVEL 4                                | STAIRS            | R-2       | 362 SF   |
| LEVEL 4                                | STORAGE           | S-2       | 114 SF   |
| LEVEL 4                                | TRASH             | S-2       | 134 SF   |
| LEVEL 4: 9                             |                   |           | 15543 SF |
| LEVEL 5                                |                   |           |          |
| LEVEL 5                                | CORRIDOR          | R-2       | 1575 SF  |
| LEVEL 5                                | MEP               | S-2       | 287 SF   |
| LEVEL 5                                | RESIDENTIAL UNITS | R-2       | 13072 SF |
| LEVEL 5                                | STAIRS            | R-2       | 362 SF   |
| LEVEL 5                                | STORAGE           | S-2       | 114 SF   |
| LEVEL 5                                | TRASH             | S-2       | 134 SF   |
| LEVEL 5: 9                             |                   |           | 15543 SF |
| LEVEL 6                                |                   |           |          |
| LEVEL 6                                | CORRIDOR          | R-2       | 1575 SF  |
| LEVEL 6                                | MEP               | S-2       | 287 SF   |
| LEVEL 6                                | RESIDENTIAL UNITS | R-2       | 13072 SF |
| LEVEL 6                                | STAIRS            | R-2       | 362 SF   |
| LEVEL 6                                | STORAGE           | S-2       | 114 SF   |
| LEVEL 6                                | TRASH             | S-2       | 134 SF   |
| LEVEL 6: 9                             |                   |           | 15543 SF |
| ROOF                                   | MEP               | S-2       | 104 SF   |
| ROOF                                   | STAIRS            | R-2       | 201 SF   |
| ROOF: 2                                |                   |           | 305 SF   |
| Grand total: 38                        |                   |           | 62477 SF |

2 PLAN DIAGRAM: LEVELS 3-6  
SCALE: 1/8" = 1'-0"



SMR Architects  
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ISSUE DATE 04/14/22  
JOB NO. 21027

TITLE  
PROGRAM  
DIAGRAMS -  
LEVELS 3-6

SHEET NO.:

A011





**PROGRAM TYPE**

- 1-BDRM
- 2-BDRM
- 3-BDRM
- CIRCULATION
- MEP/STORAGE
- OFFICES
- PARKING
- RESIDENTIAL COMMON
- RETAIL

| Area Schedule (Occupancy) - Building Totals |           |           |
|---|-----------|-----------|
| NAME  | OCCUPANCY | AREA      |
| BIKE STORAGE                                | S-2       | 897 SF    |
| CORRIDOR                                    | R-2       | 8154 SF   |
| COURTYARD                                   | A-3       | 3217 SF   |
| LAUNDRY                                     | R-2       | 772 SF    |
| LEASE SPACE                                 | B         | 3328 SF   |
| LOBBY                                       | R-2       | 892 SF    |
| MEP   | S-2       | 2561 SF   |
| OFFICE                                      | B         | 576 SF    |
| PARKING                                     | S-2       | 16685 SF  |
| RESIDENTIAL AMENITY                         | A-3       | 776 SF    |
| RESIDENTIAL UNITS                           | R-2       | 71717 SF  |
| STAIRS                                      | R-2       | 3106 SF   |
| STORAGE                                     | S-2       | 673 SF    |
| TRASH                                       | S-2       | 1211 SF   |
| VESTIBULE                                   | R-2       | 275 SF    |
| Grand Total: 72                             |           | 114839 SF |

| SUMMARY UNIT AREA AVERAGES |       |          |            |
|----------------------------|-------|----------|------------|
| UNIT TYPE                  | COUNT | AVG AREA | TOTAL AREA |
| 1-BR UNIT                  | 30    | 505 SF   | 15161 SF   |
| 2-BR UNIT                  | 54    | 735 SF   | 39677 SF   |
| 3-BR UNIT                  | 5     | 985 SF   | 4925 SF    |
| 3-BR UNIT - LEVEL 1        |       | 605 SF   | 3025 SF    |
| 3-BR UNIT - LEVEL 2        |       | 662 SF   | 3312 SF    |

2 DIAGRAM: SECTION LOOKING NORTH

SCALE: 1/8" = 1'-0"

0' 4' 8' 16'



1 DIAGRAM: SECTION LOOKING EAST

SCALE: 1/8" = 1'-0"

0' 4' 8' 16'



**TACOMA HOUSING AUTHORITY**

**CLIENT SUPPORT  
& EMPOWERMENT**



# TACOMA HOUSING AUTHORITY

**DATE:** April 27, 2022

**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

As anticipated, March was another busy month for the Client Support and Empowerment department. Staff continued to shine, supporting residents and voucher holders in setting and reaching many goals, mitigating and managing crisis, and lining up new programs, services and opportunities for our community members. Staff continue to think of new ways we can change and adapt our support services to better align with resident and voucher holders' expressed needs and to provide culturally relevant and responsive support.

One of the small, but hopefully very impactful, changes we initiated this month was to change the title of Case Worker to something that better aligns with our work and respects those we work in service to. The term "Case Worker" is both antiquated and refers to humans as "cases". While the job associated with this title is widely understood within the social work field, the team felt it important to change our language to better align with our values. To that end, the team came up with three options for the community to choose from: Resource Navigator, Community Advocate, and Support Partner. Staff then began sending a survey out to folks, and we hope to have a new title for staff in this role in mid-May.

The department, and specifically the leadership team continued to push on with the CSE Strategic Planning process, in conjunction with BERK Consulting. This process is aimed at helping the department better align with agency goals, determine what is squarely within

scope, and determine what types of supports are better provided by outside agencies. A primary learning thus far, is that the vast majority of referrals CSE receives are for folks in crisis and/or housing instability – a form of crisis in itself. And, working with families in crisis takes up a good chunk of CSE time. As we dive into the data, we are also starting to realize that, when staff can engage with residents who are not in crisis, we can collaboratively work together to mitigate crisis and to build upon family’s resources and stability. This “upstream” work is a more proactive approach and ultimately can help families avoid crisis altogether, which also helps THA on several fronts. As this learning and the planning that will come with it come into shape, we will engage with staff, residents and voucher holders, THA leadership and Commissioners Smith and Hodge on the Education, Services and Housing Subcommittee to ensure alignment across all fronts.

### **3. DEPARTMENT UPDATES**

#### **3.1 Staffing Updates**

This month, Supervisor Kye Hillig posted for two staff positions supporting our Whole Family Services program and general services, replacing Laurel Kennedy who is moving to Texas with her family, and Rob McAfee who recently began his new role in CSE as the Community Builder in Salishan.

#### **3.2 Program Updates**

##### **3.2.1 Two Generational Opportunity (2Gen)/Child Savings Account**

The 2Gen team remains busy! In March the team focused on integrating the Child Savings Account into the program, bridging pathways to post-secondary education with the hope that all youth will have access to a college savings account.

CSE & PIE are in the early stages of exploring on a data sharing agreement with the Washington student Achievement Council (WSAC). To strengthen THA's education work around lowering barriers for families to access post-secondary pathways and resources including the 529 GET program (through the Children's Savings Account program) and the state's efforts to automate identification & eligibility of low-income households for the Washington College Access Grant through a means tested way (in this case, verifying family median income through public housing authority households). A data sharing agreement will help to expedite the enrollment process into these programs/resources for families,



removing barriers for families to gain financial resources for their post-secondary goals.

Education Specialist Marty Higgins was invited to speak about the relationship between THA and Tacoma Public Schools at the “Navigating the Housing System” seminar hosted by Building Changes. Marty garnered an amazing response from other Washington state housing authorities and other school districts with questions and interest in this partnership. This month, Marty also made progress creating a stronger relationship with Lister Elementary to help THA/TPS families.

### **3.2.2 Family Self Sufficiency Program (FSS)**

Staff in the FSS program have been developing the FSS program manual, including forms to be included in the FSS administration process. This will allow current and future FSS staff to have clear, documented processes from which to work, ensuring consistent service and program delivery. To date, the introduction, program description, eligibility and enrollment, outreach plan, marketing materials, escrow account description, pay point process, goal completion verification, interim disbursement and graduation processes are drafted. The complete manual should have a completed rough draft by the end of April.

### **3.2.3 Economic Security for All (EcSA)**

The first round of ESD’s Economic Security for All program wrapped up in March. This program has been a collaborative effort to connect job seekers on the east side with skills programs and job opportunities. The program has received attention from the state such that the state is funding another round! Round two will open the program up for participants from all of Pierce County, rather than the limited zip codes included in the initial round. THA, WorkForce Central, Career Team and the United Way of Pierce County met together to discuss how we can strengthen our partnerships and leverage resources to best support job seekers across the county. The group is hoping to achieve several goals including: wrapping EcSA services into the Center for Strong Families (CSF); leveraging the employment counseling expertise of Career Team along with whole-family-centered coaching and income supports coaching at THA; and,

strengthening data sharing between the agencies to evaluate the outcome of families who are participating in EcSA and the CSF.

The second round of this program will fund .3 FTE who will outreach to and support THA families as they engage in the program. We will combine this funding with Siemer Institute funding to shift and focus an intentional position dedicated to integrating WorkForce Central programming with the CSF. To this end, we have started seeing a breakdown between previously siloed asset building and employment programs within the county, and with our partners, spearheaded by CSE staff. Career Team has agreed to bring a Career Navigator to Bay Terrace and Salishan to strengthen in-person services and to support service coordination.

### **3.2.4 Summer Programming**

CSE staff have been hard at working ensuring that there are pro-social opportunities for young people within our portfolio this summer. We have entered into a contract with Green Trike as the Out of School Time Intermediary who will serve as the main hub between THA and community partners in providing SEL learning content, activities, and programming. The partnership brings a direct flow of learning targets and objectives directly from Tacoma School District through the foundation and to the OSTI, providing our families with appropriate and trauma informed content and programs developed through a vetted and successful framework for student learning throughout the summer and additional "out of school time". The Program will take place at Bay Terrace and Dixon from 9-12am on Tuesday, Wednesday and Thursdays. St. Leo's will be providing dropped lunches towards the end of the program each day and on off program days, staff will be available to help distribute.

We also have a tentative agreement with Metro Parks to provide outdoor sports and activities at Salishan Monday-Friday. They will arrange for 3-on-3 basketball, soccer STEAM and project-based learning activities. They will also be bringing in partners such as the Tacoma Public Libraries and the Glass Museum for enrichment activities, along with lunches at their events.

Club Z and KBTC will continue mentorship and engagement sessions three days per week at Bergerson, Hillside and Bay Terrace, focusing on STEAM activity kids and structured play. Lunches will be provided by St. Leos.

Finally, the Y on the Fly bus and programming will be provided at Bay Terrace and Dixon with additional supports on Tuesday-Thursday and we are working with The Grand Cinema to provide another round of film camp at Salishan this year.

Most of these activities have been arranged by Marty Higgins on the CSE team, so a HUGE thank you to Marty for all his work!

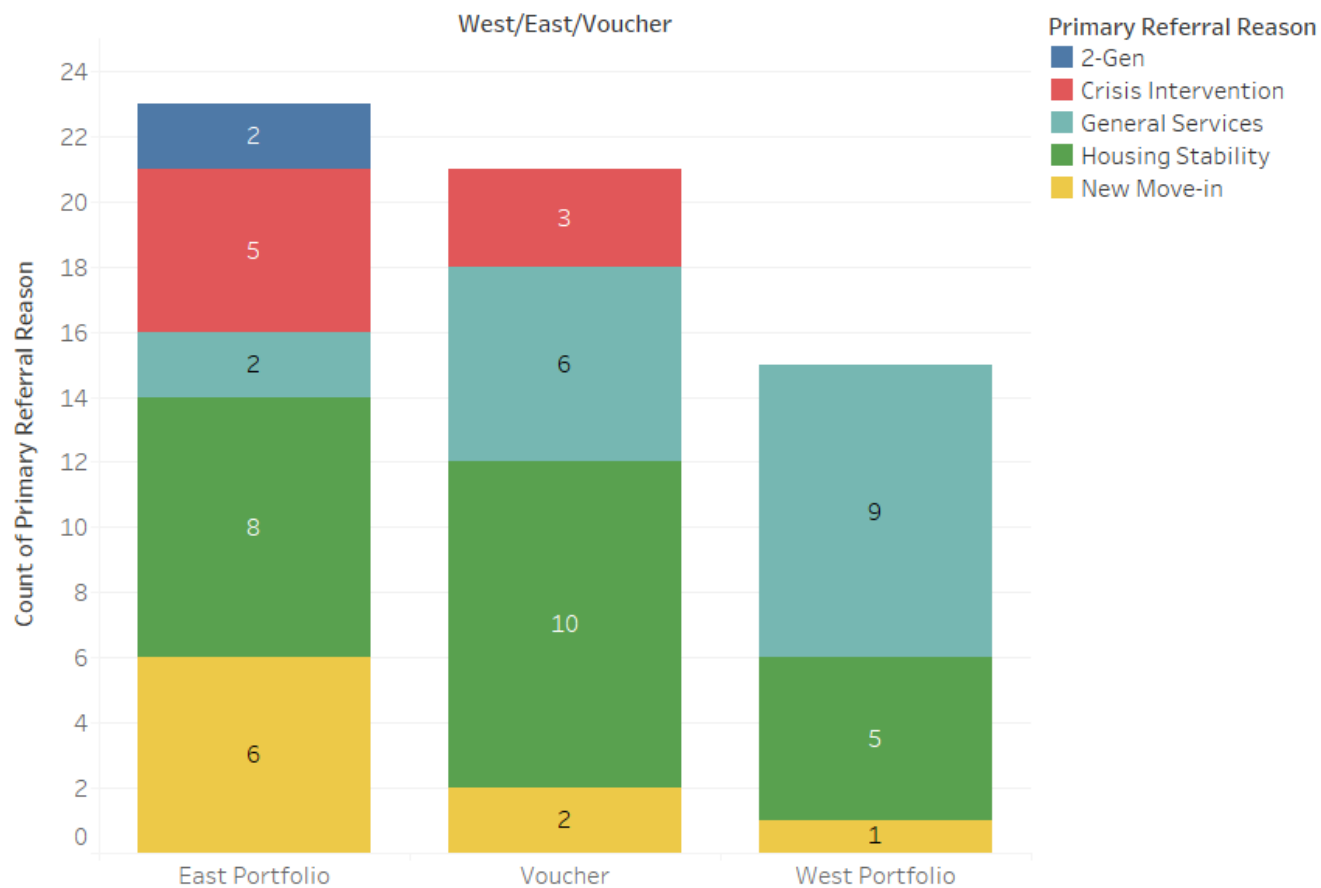
### **3.2.5 By the Numbers**

Program Manager Kendra Peischel has been leading CSE in the effort to find a new database system that can better capture CSE's work and outcomes. This is no small feat, and Kendra has been a steadfast leader. In March she continued vetting systems, identifying three that we will invite to demonstrate their products' capabilities, with a goal of completing demos by the end of April.

The first chart below shows how many families were referred to CSE services in April. They are broken out by location of where they family lives, and then by what type of support they were referred to.

The second chart indicates the number and type of referrals CSE made for/with families. This means that, when working with a family or individual, CSE staff work with them to identify the households' needs and then refers the household to supports that can help them with those needs. One household often receives several referrals to outside supports, helping the households with various items and leveraging community resources already in existence and positioned to support any number of efforts.

## All Referrals Received by CSE 2022 March



Count of Primary Referral Reason for each West/East/Voucher. Color shows details about Primary Referral Reason. The data is filtered on Date Referred Month, which keeps March. The view is filtered on West/East/Voucher, which has multiple members selected.

## 2022 Resource Connections Provided by CSE February

| Referral Service Type                     | Referral Date |             |
|---|---------------|-------------|
|   | March         | Grand Total |
| Food Assistance Programs                  | 652           | 1,703       |
| Tax Assistance                            | 3             | 43          |
| Community Building                        |               | 39          |
| Employment Assistance-Adult               | 18            | 64          |
| Education-Adult                           | 59            | 89          |
| General Assistance Programs               | 22            | 67          |
| Rental Assistance                         | 36            | 60          |
| Tacoma Arts Free Tickets                  |               | 8           |
| Education-Youth                           | 14            | 45          |
| Asset Building                            | 5             | 20          |
| Utility Assistance                        | 12            | 36          |
| Dependent and Childcare Services          | 7             | 14          |
| Behavioral Health                         | 6             | 23          |
| Healthcare Connections                    |               | 6           |
| Furniture Bank                            | 4             | 13          |
| Financial Coaching (Classes)              | 5             | 15          |
| Physical Well Being                       | 4             | 8           |
| Legal Assistance                          | 12            | 24          |
| Transportation Assistance                 |               | 4           |
| Employment Assistance-Youth               | 4             | 4           |
| Aging and Disability Resource Center (A.. | 1             | 1           |
| Grand Total                               | 864           | 2,286       |

Count of Referral Service Type broken down by Referral Date Month vs. Referral Service Type.





**TACOMA HOUSING AUTHORITY**

**RENTAL ASSISTANCE**



# TACOMA HOUSING AUTHORITY

**DATE:** April 27, 2022

**TO:** THA Board of Commissioners

**FROM:** Aley Thompson  
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

Utilization remains strong across our programs at 99.6%. We are overissuing vouchers for our FUP, Mainstream and NED programs to bring us as close to full utilization as possible. Over the past two months we've been 12% and then 18% utilized with our Emergency Housing Vouchers, this month we reached 25% utilization. We are developing a plan to propose an additional referral source as a back-up plan to ensure we reach full utilization by the end of 2022. The Foster Youth to Independence vouchers are live and we have referrals. The Board can expect to see us "on the board" with voucher issuances next month.

It has been a busy month full of contracts, policy review and cross departmental partnerships evidenced by the number of resolutions presented tonight. We are grateful to reexecute contracts with our third party PBV partners to continue to make housing available to vulnerable members of our community.

This month we worked in partnership with PIE to evaluate a PBV proposal from Pioneer Human Services to project-base up to 25 vouchers to serve people exiting corrections. There are a few things we need to sort out with the properties, but we are looking forward to a successful partnership. The PIE report contains additional details about that proposal.

We also worked in partnership with Property Management and PIE to develop a partnership with Pierce County to fill units set-aside for homeless households within THA's portfolio. Our leasing team will be able to take referrals directly from Coordinated Entry which should allow us to fill vacancies quickly and house literally homeless families in our community.

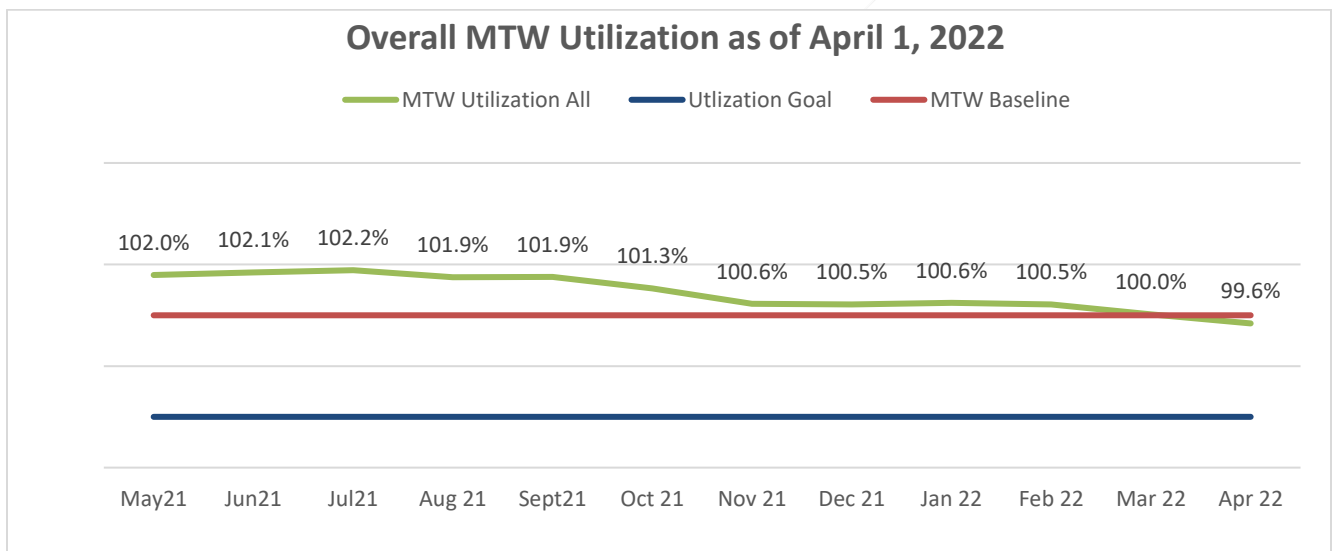
Our inspections team is partnering with Property Management to consolidate and streamline the number of inspections we conduct throughout the portfolio. Property Management will conduct "PM" inspections and Housing Quality Standards "HQS" inspections at the same time. This will be less disruptive to our tenants and will save valuable resources and time.

We are thrilled to report that our shared caseload model or “Gold Team” is starting to hit its stride. This month response times to calls or emails from customers fell below 48 hours. We receive hundreds of emails and/or calls in a given day so achieving this benchmark is a major victory! Over the next few months our Special Programs team will also transition to a shared caseload model. We’ve shared our lessons learned about a shared caseload model with our colleagues at Bellingham and Pierce County Housing Authorities.

### 3. RENTAL ASSISTANCE DEPARTMENT REPORTS

#### 3.1 Overall Utilization

The overall Housing Choice Voucher utilization is reported at 99.6% as of April 1, 2022. 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 (historical numbers may change slightly).



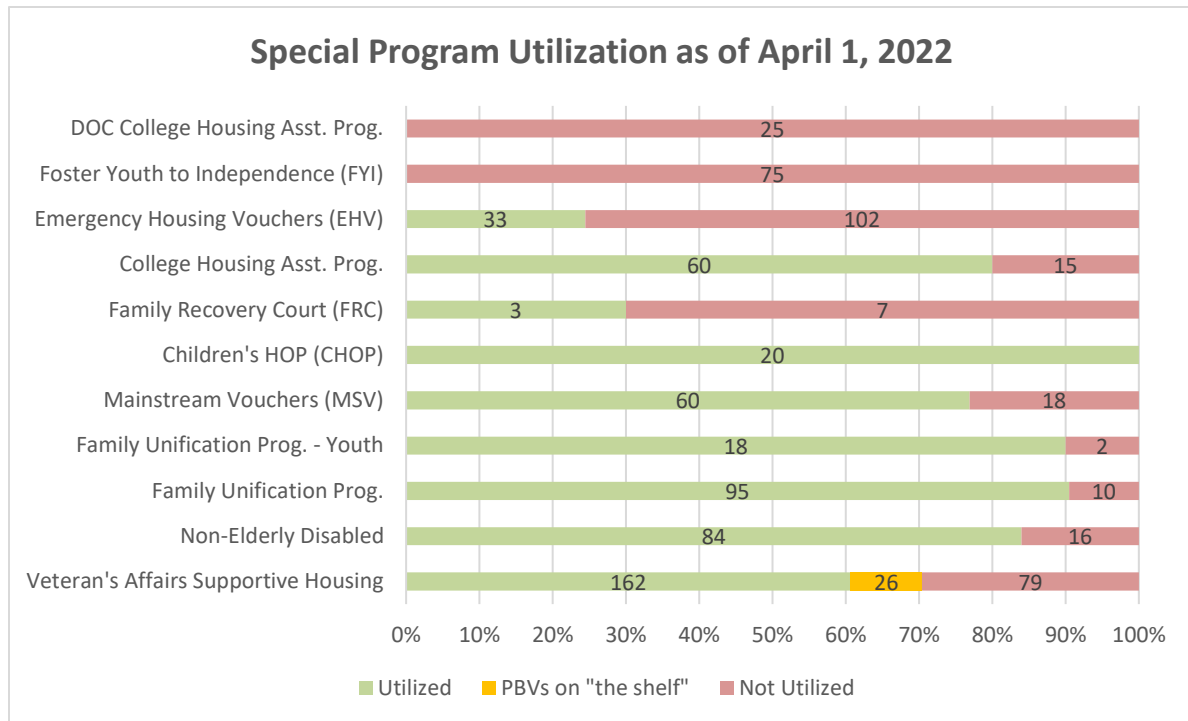
#### 3.2 Project Based Vouchers (PBVs)

Project Based utilization continues to remain at 97% utilized. Staff continue to monitor vacancies and remind partners of the urgency to fill the few vacant units. Hilltop Lofts is the next large project-based partnership expected in late 2022. Hilltop Lofts will add 57 project-based permanent supportive housing units to the community. All 57 referrals will be processed through the Rental Assistance Department.

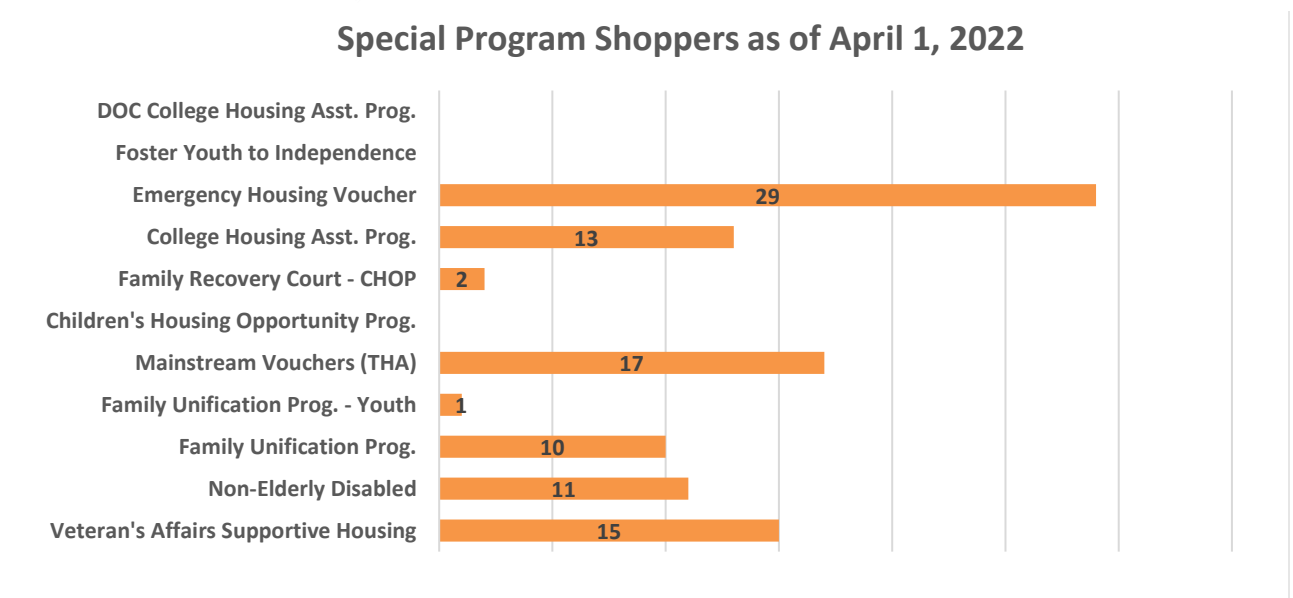
#### 3.3 Special Programs & Property Based Subsidies

Below is a breakdown of the utilization of THA’s special programs. The charts below include utilization & shoppers for each program. THA has received 8 Foster Youth to Independence referrals and will begin meeting with DCYF, PCA and CLR monthly to ensure referrals are adequate. THA’s EHV utilization has reached 24%. This represents 33 active households with an increase of 14 households since the March Board meeting. THA continues to receive referrals for

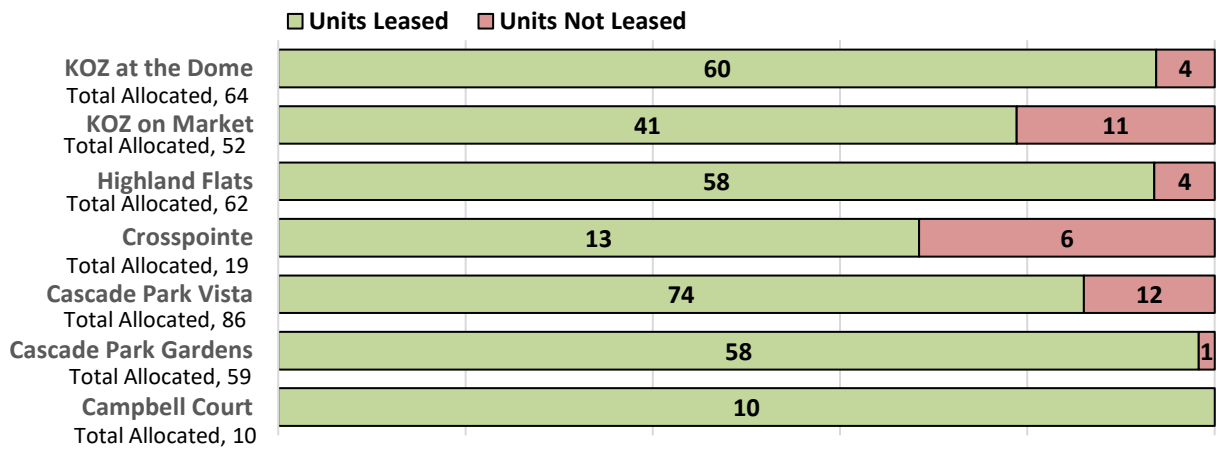
the EHV program but we are planning for back up referral pipelines to ensure adequate referrals throughout 2022. Staff are currently processing 38 referrals across all special programs including EHV, VASH, Mainstream, Project Based and FYI



As of April, this graph was updated to reflect any vouchers “on the shelf” or committed to future PBV developments. We seek to PBV additional VASH vouchers this year and we hope to PBV the entire DOC tenant-based voucher allocation (refer to PIE’s report for a detailed proposal).



### Property Based Subsidy Utilization as of Q4 Report: January 2022



THA has partnerships with four Property Based Subsidy owners representing more than 350 units across seven properties. The contracts require the properties to maintain a 95% occupancy rate each quarter. As of the January 2022 report:

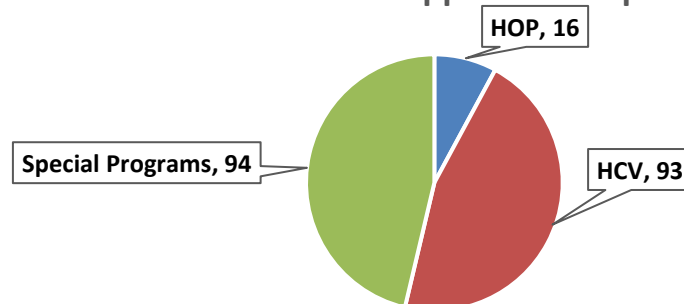
- Koz at the Dome, Cascade Park Gardens and Campbell Court maintain a 95% occupancy rate.
- Cascade Park Gardens is out of compliance, but we adjusted their unit counts across properties to ensure compliance, this will be reflected in the May board report (reflecting Q1 numbers).
- Koz on Market, Highland Flats and Crosspointe are meeting the 95% occupancy requirement, but we are temporarily not subsidizing 20 units across these properties due to compliance findings. We expect the units will be in compliance at unit turn.

### 3.4 Shoppers Report & Housing Success Rate

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. The shoppers in the chart below include clients new to the program and clients moving from one unit to another.

- As of April 2022, there are 203 total clients shopping (new shoppers & movers).

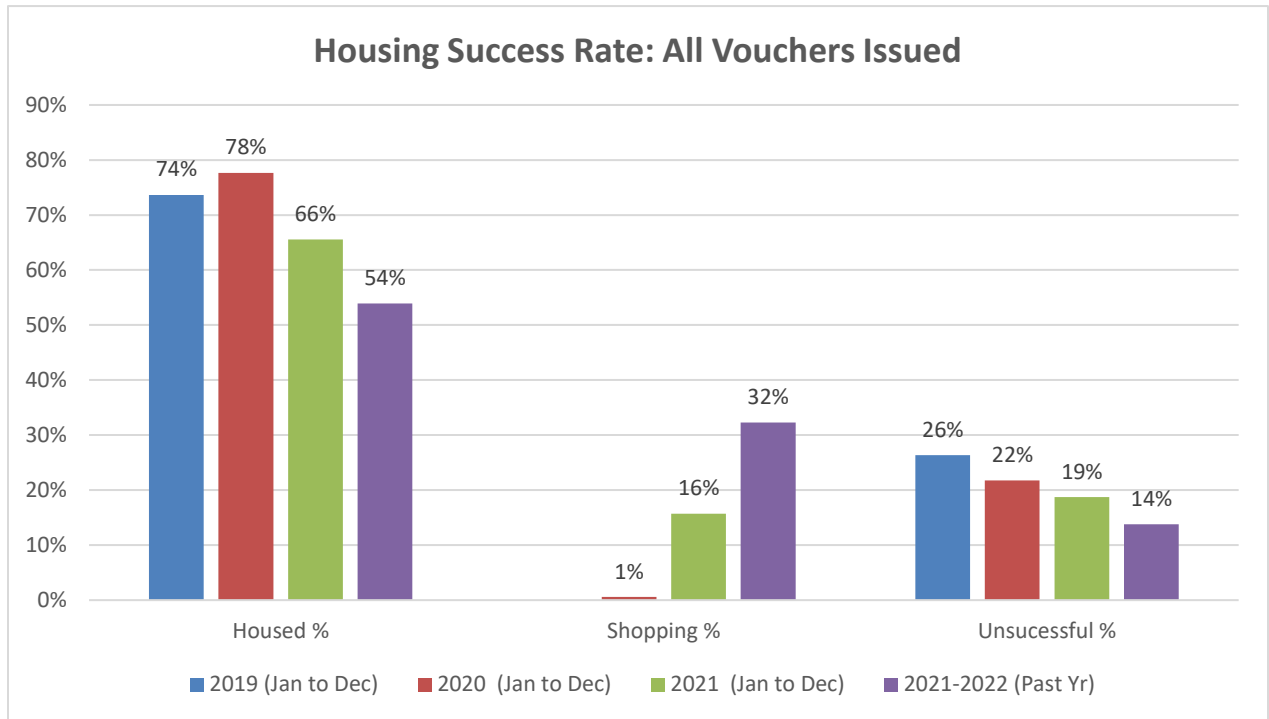
### Number of Active Shoppers as of April 1, 2022



- Over the past year (April 1, 2021 – March 31, 2022), 588 vouchers were issued and 205 were to new families.



- The overall housing success rate<sup>1</sup> is 54% and 50% for new families (this excludes current shoppers). The average number of shopping days for current shoppers is 101 and 17% of all shoppers been granted extensions.



### 3.5 Inspections

Stacey Peterson-Wilson our new inspections supervisor is teaming up with Property Management staff to streamline inspections. As Property Management begins to inspect THA units, they will conduct a Property Management inspection and an HQS inspection at the same time. This reduces redundant work across the agency and minimizes inconvenience for our tenants. We will implement this strategy across the Portfolio this year and Rental Assistance will conduct quality control inspections to ensure compliance.

<sup>1</sup> This graph and the way this data is presented was reconfigured for April's report



**TACOMA HOUSING AUTHORITY**

**PROPERTY MANAGEMENT**



# TACOMA HOUSING AUTHORITY

**Date:** April 27, 2022

**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

If the first quarter's performance is any indication of how the PM team will move throughout the year, then we are off to a good start!

Our occupancy remains at 99% for this month. We congratulate our leasing and turn teams for their hard work and dedication to keeping this status.

There is a new perspective across the portfolio with an emphasis on new staff, projects, and performance indicators.

THA welcomed several new staff to our family in this quarter. I would like to introduce you to our most recent additions to the team, Heather Anderson, and Roy Herron.

- **Heather Anderson** – is our new Property Specialist and will be working in the West Portfolio at our EB Wilson and 6<sup>th</sup> avenue Senior/Disabled Properties. Heather joined us on March 14<sup>th</sup>, and she comes with over 15 years' experience in Property Management. When Heather is away from work, she enjoys spending time with family and friends, loves to spoil her two cats, and can't wait for summer! Heather is very excited to be part of THA and is looking forward to meeting other staff at the agency, as we reopen.
- **Roy Herron**- is our new Maintenance Tech and will join our Turn Team. Roy started with us on March 14<sup>th</sup>, as well. He brings over 41 years of experience in the maintenance field. Roy enjoys going to work and working at his home when the weather permits. He is very excited to join our team.

Our last hire in the maintenance depart will come on board next month. With the final two positions filled, we have a full complement of maintenance staff for the first time in a long time. The March work order numbers reflect an increase in the number of works orders completed, which correlation to the number of staff onboard and the result of the start of the unit inspection process. We will continue in April with the hiring for Facilities Manager and two Maintenance Supervisors positions. We will provide updates in the May report.

Bringing on several other positions, such as the Eviction Prevention and the Operations Coordinators, we add tools to our toolbelt to help clients with information and resources for recovering from delinquent accounts and education on strategies for prevention in the future.

Other projects underway in the portfolio focus on safety, as well as a capital needs assessment after an almost two-year hiatus from inspections. The smoke detector replacement project goes together with the start of in unit inspections and has proven to be a perfect marriage of tasks. Management staff joined the maintenance team in all properties except for Arlington and the Rise at 19<sup>th</sup> since those properties are already equipped with the latest equipment, to install new smoke detector/CO2 combo units in every home.

Our asset distribution project is still underway and going well. We will provide an update in the May report.

Our turn data is provided in a new format. Unit turns are categorized in one of two ways; regular or extraordinary. We termed units as extraordinary a few years ago when we discovered there were obstacles to turning a unit in 20 days or less if it were an eviction, transfer or required pest control treatment.

Units in one or more of these categories require mandatory timelines that exceed 20 days. For example, a unit needing pest control treatment cannot have a standard trash out at the start and requires two treatments, the first at day one and the second at day 14. This pushes the available turn days out and disqualifies this unit as a regular turn.

We will begin to provide this data to you, with details, so that Board is familiar with turn time and the data behind each turn.

As the weather moves toward sunny days, mixed with a little snow, staff are looking toward the future. New perspectives mean new opportunities, and these are all very positive to them.

I would like to thank my team for the outstanding work they continue to do each day. A special thank you to Marquis Jenkins for the heavy shoulders of carrying the portfolio during some very challenging times and doing so with grace and smile.

As we prepare to bring on more properties, such as Housing Hilltop, we are gearing up to tailor each property to its needs, but with the THA touch.

Our staff know and understand the language that THA speaks. We understand the mission and work toward the vision of housing Tacoma in a way that no other landlord can.

Although we had some wonderful candidates for Pet of the Month last month, unfortunately we do not have a photo of our Pet of the Month for April. That means we can double up on the pets next month! A special thank you to Denise Day-Joseph and Martha Matthias for the pet goodie bags and certificates they provided for our winners!

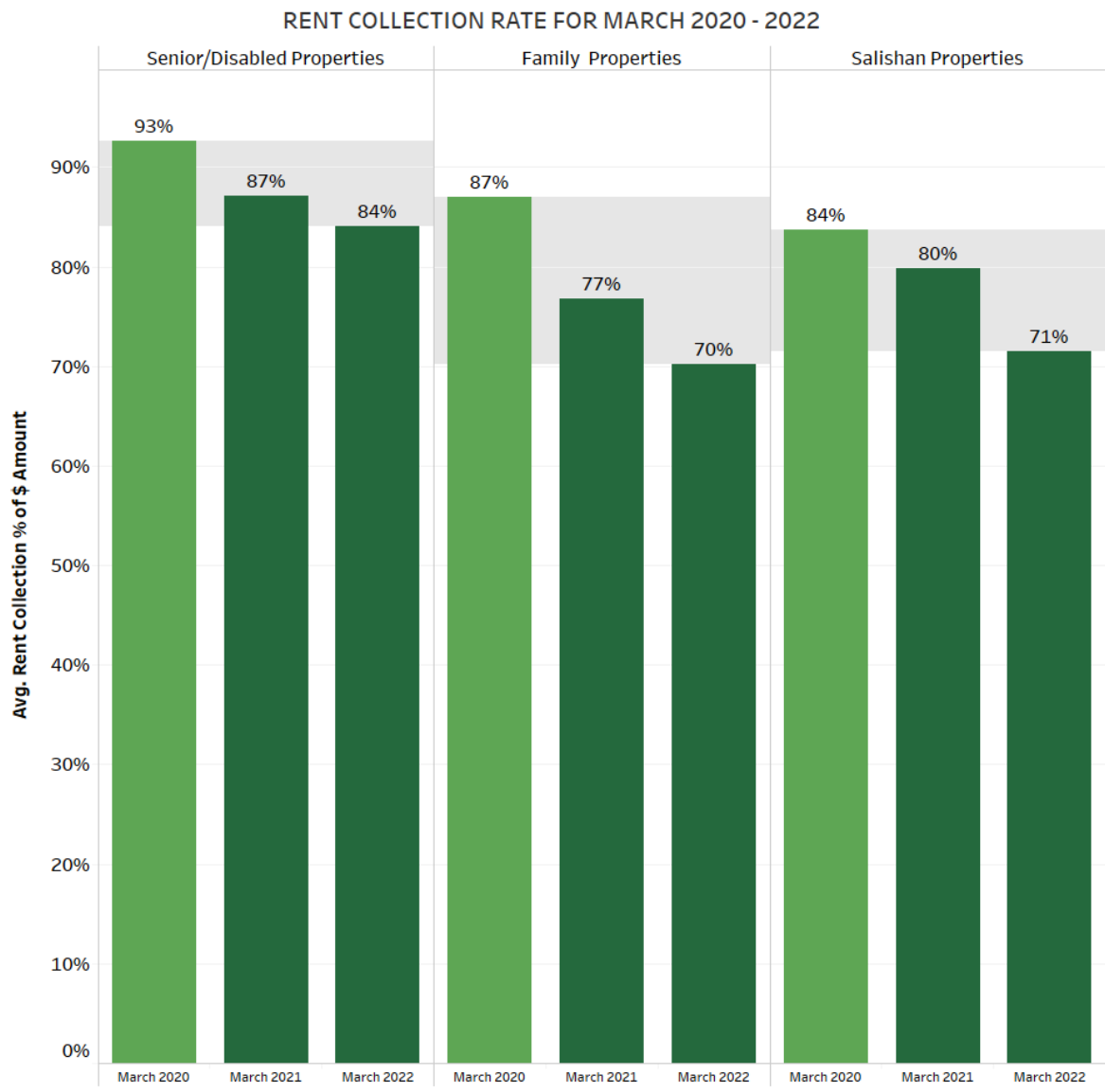
### **3. KEY MEASURES OVERVIEW**

#### **3.1 Tenant Rent Payments**

The following chart shows rent collection by property type over the last three years. The Rent Collection chart provides the average percent of rent collected through the last day of each reporting month by year and 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.



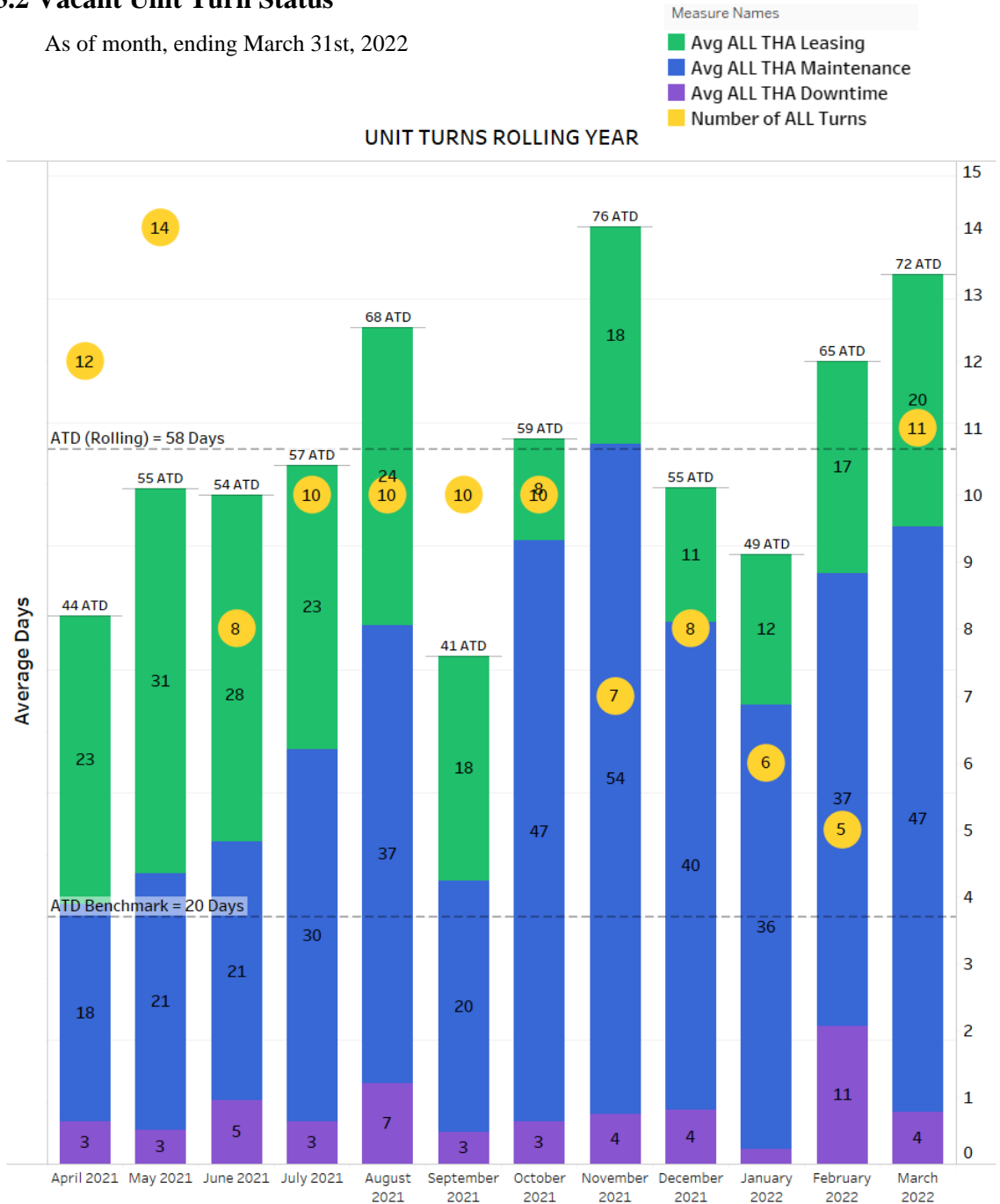




The chart above shows a significant increase in rent collection for the Family Properties over the last month. For reference we reported a collection of 56% for the month of January. Overall, we still see a decrease in rent collection compared to 2020. For reference, THA has chosen to begin this process in April 1, 2022, before issuing COVID repayment agreements and legal notices for late rent. Waiting until April provided more time for the County to catch up on rental assistance requests and for more tenants to apply and receive assistance. Just this week the portal reopened and is accepting applications. We anticipate receiving additional funds because, we have tenants waiting for assistance and we continue to connect tenants with rental resources. Last month we had 385 households with late rent. Currently we are at 371 with late rent. We do not know exactly how many of these households are waiting for rental assistance.

### 3.2 Vacant Unit Turn Status

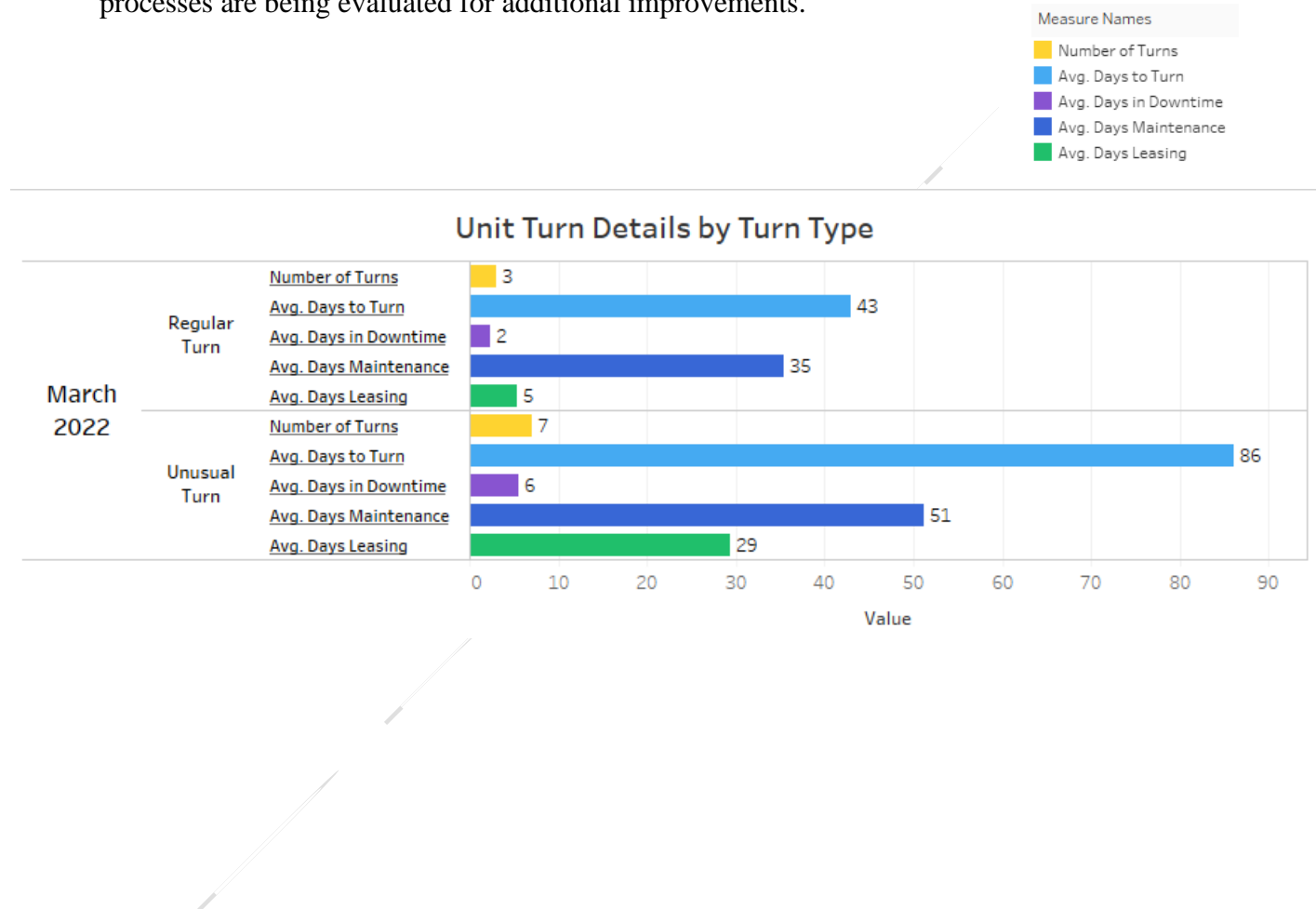
As of month, ending March 31st, 2022



This data reflects the collective forces of the Turn and Leasing teams efforts to maintain a monthly benchmark of 20 days or less. Leasing days did increase over the last month as well as the overall turn numbers. Notwithstanding the challenges of closed offices, teleworking and social distancing, the teams worked hard to quickly house families as soon

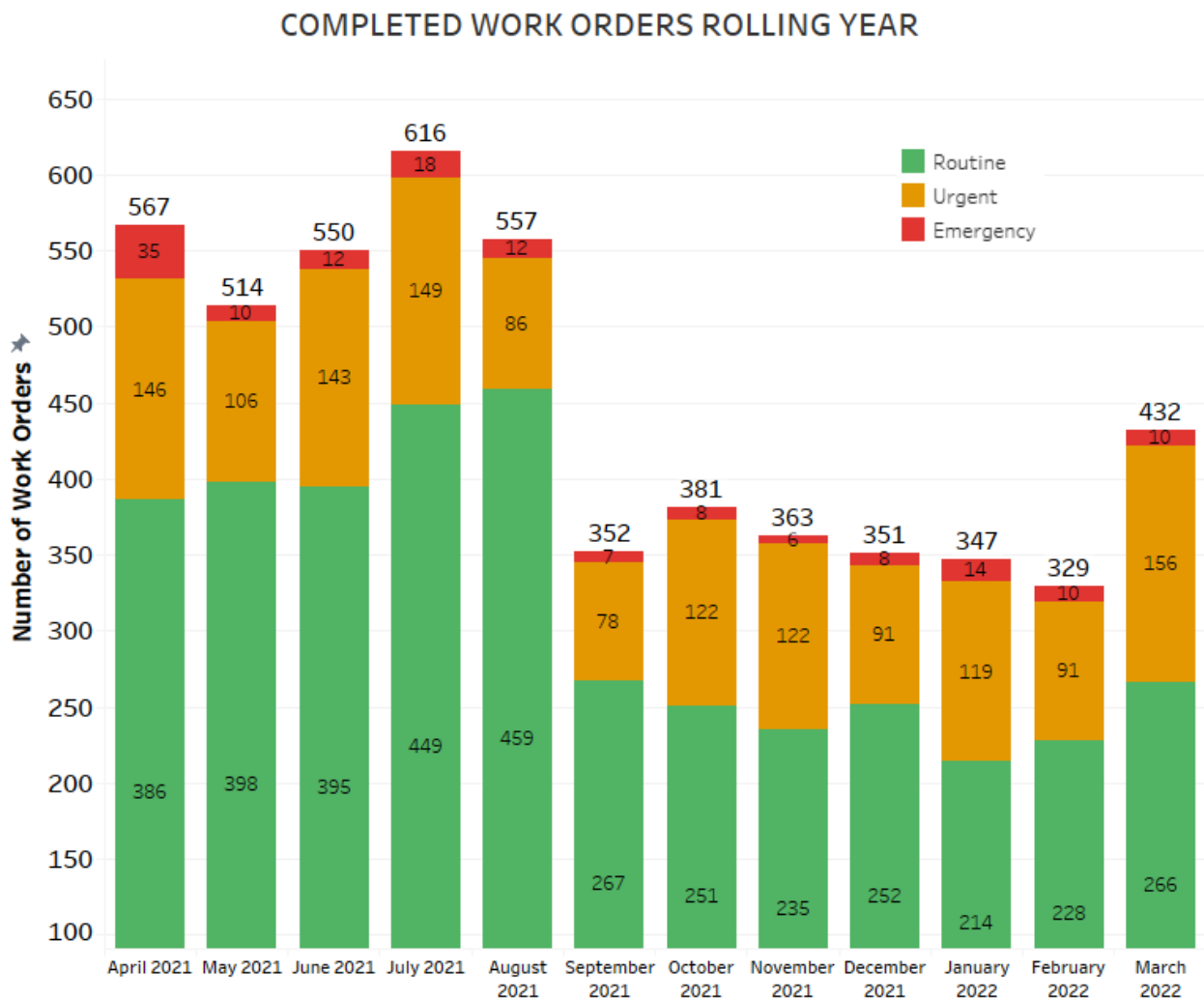
as possible. Property Management accomplished a rolling average turn day (ATD) of 58 days.

The following chart breaks apart the turns based on the turn type, regular or unusual. Three turns were for regular reasons, and averaged 43 key-to-key days, and 7 turns were unusual which averaged 86 key-to-key days. We are continuing to find ways to reduce overall key to key times. Leasing will soon transition to Rental Assistance to provide an overall support and better collaboration for the leasing team members. Turn days and processes are being evaluated for additional improvements.



### 3.3 Work Orders

This chart summarizes the completed work orders by month. In March, 100% of the emergency work orders were completed within 24 hours and all urgent work orders completed within 72 hours. We are still holding on routine work orders however, some of these are addressed as items upgrade to urgent status. Routine work orders will be address in conjunction with unit inspections. The goal is to move forward and slowly phase in these processes in the month of April.





**TACOMA HOUSING AUTHORITY**

**NEW BUSINESS**



# **Resolution 1**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (1)

**Date:** April 27, 2022

**To:** THA Board of Commissioners

**From:** April Black  
Executive Director

**Re:** Approval of Property Based Subsidy Contract Extension – Crosspointe Apartments

---

*Tacoma Housing Authority (THA) is party to a seven (7) year Property Based Subsidy Housing Assistance Payment (HAP) contract for units at Crosspointe Apartments. This resolution will extend the contract from seven (7) years to ten (10) years.*

### Background

On March 20, 2019, THA executed a Property Based Local Rent Subsidy Agreement with CWD Investments I LLC and JGD Investments I, LLC. This contract and subsequent amendments stipulate that THA pays Housing Assistance Payments (HAP) for 19 covered units at Crosspointe Apartments. The units are rented to eligible households who may be:

- Extremely low-income students who are homeless or near homeless; or
- Other student households with incomes below 30% AMI; or
- a qualified tenant with a household income at or below 30% of area median income.

The tenants are not THA program participants, but they realize affordable rents because of THA's subsidy.

The term of the contract is for seven (7) years and terminates on March 20, 2026. The owners seek to extend the contract through October 31, 2029 to ensure adequate financing for continued operations at the property and to align the contract renewal date with Highland Flats Apartments.

With approval of this resolution, THA will extend the contract with CWD Investments I LLC and JGD Investments I, LLC through 2029.

### Recommendation

Approve Resolution 2022-04-27 (1) authorizing THA's Executive Director to extend the Property Based Subsidy (PBS) Housing Assistance Payment (HAP) contract with CWD Investments I LLC and JGD Investments I, LLC at Crosspointe Apartments through 2029.



# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (1)**

### **(Approval of Property Based Subsidy Contract Extension – Crosspointe Apartments)**

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

**WHEREAS**, THA has been providing Property Based Subsidy housing assistance payments to Crosspointe Apartments since 2019; and

**WHEREAS**, Crosspointe Apartments houses low-income households and homeless and near homeless students; and

**WHEREAS**, Failure to extend this contract may lead to a loss of affordable housing units; 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 negotiate, and if those negotiations are successful, to execute an extension to the Crosspointe Apartments Property Based Subsidy contract through 2029.

**SEVENTH AMENDMENT  
to the  
PROPERTY-BASED SUBSIDY CONTRACT with CWD Investments I LLC  
at  
HIGHLAND FLATS APARTMENTS**

APRIL 2022

The HOUSING AUTHORITY OF THE CITY OF TACOMA, WASHINGTON, a municipal corporation/political subdivision of the State of Washington, (referred to as "THA") and CWD INVESTMENTS I LLC and JGD Investments, LLC, Washington limited liability companies ("Owner") agree as follows:

THA and Owner are parties to a contract effective March 20, 2019, for the provision of providing affordable housing to low-income students ("Agreement"). They agree to the following amendments to that contract as denoted by the redlining below:

**3. TERM OF AGREEMENT**

This Agreement is effective as of the Effective Date. Unless the parties terminate the Agreement earlier pursuant to its terms, the initial term of this Agreement is seven (7) years (the "Term"). The parties may renew or modify this Agreement by agreement in writing. Any extension must comply with MTW Requirements.

THA and Owner agree to extend the contract term through October 31, 2029. This extends the contract term from seven (7) years to eleven (10) years.

All the other terms and conditions of the CONTRACT shall remain unchanged.

*[Signatures Follow]*

**TACOMA HOUSING AUTHORITY**

**CWD Investments**

---

April Black  
ITS: Executive Director

Date: \_\_\_\_\_

---

Chad Duncan  
ITS: Member and Manager

Date: \_\_\_\_\_

**JGD Investments I, LLC**

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John Duncan  
ITS: Manager

Date: \_\_\_\_\_

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair



# **Resolution 2**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (2)

**Date:** April 27, 2022

**To:** THA Board of Commissioners

**From:** April Black  
Executive Director

**Re:** Approval of Property Based Subsidy Contract Extension – Highland Flats Apartments

---

*Tacoma Housing Authority (THA) is party to a seven (7) year Property Based Subsidy Housing Assistance Payment (HAP) contract for units at Highland Flats. This resolution will extend the contract from seven (7) years to eleven (11) years.*

### Background

On October 31, 2018, THA executed a Property Based Local Rent Subsidy Agreement with CWD Investments I LLC (and subsequently through contract amendments JRO Ventures I, LLC and JGD Investments I, LLC). This contract stipulates that THA pays Housing Assistance Payments (HAP) for 62 covered units at Highland Flats Apartments. The units are rented to eligible households who may be:

- households that have been issued a College Housing Assistance Program (CHAP) voucher by THA (although the household may not use the CHAP voucher to pay the Tenant Rent at the Premises since THA already subsidizes the rents under the agreement); or
- households that are homeless and eligible for CHAP under Tacoma Community College (TCC) screening criteria but have not been issued a CHAP voucher; or
- other Households that are eligible for CHAP under TCC screening criteria but have not been issued a voucher; or
- households that are TCC students with incomes below 30% area median income; or
- a qualified tenant with a household income at or below 30% of area median income; or
- a previous residents of Highland Flats that was at risk of homelessness at the time of transition to new ownership (Highland Flats was formerly Tiki Apartments).

The tenants are not THA program participants, but they realize affordable rents because of THA's subsidy.

The term of the contract is for seven (7) years and terminates on October 31, 2025. The owners seek to extend the contract through October 2029 to ensure adequate financing for continued operations at the property.

With approval of this resolution, THA will extend the contract with CWD Investments I LLC and JRO Ventures I, LLC and JGD Investments I, LLC through 2029.

### **Recommendation**

Approve Resolution 2022-04-27 (2) authorizing THA's Executive Director to extend the Property Based Subsidy (PBS) Housing Assistance Payment (HAP) contract with CWD Investments I LLC and JRO Ventures I, LLC and JGD Investments I, LLC at Highland Flats Apartments through 2029.



# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (2)**

### **(Approval of Property Based Subsidy Contract Extension – Highland Flats Apartments)**

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

**WHEREAS**, THA has been providing Property Based Subsidy housing assistance payments to Highland Flats Apartments since 2018; and

**WHEREAS**, Highland Flats Apartments houses low-income households and homeless and near homeless students; and

**WHEREAS**, Failure to extend this contract may lead to a loss of affordable housing units; 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 negotiate, and if those negotiations are successful, to execute an extension to the Highland Flats Apartments Property Based Subsidy contract through 2029.

**FOURTH AMENDMENT**  
**to the**  
**PROPERTY-BASED SUBSIDY CONTRACT with CWD Investments I LLC**  
**at**  
**HIGHLAND FLATS APARTMENTS**

FEBRUARY 2022

The HOUSING AUTHORITY OF THE CITY OF TACOMA, WASHINGTON, a municipal corporation/political subdivision of the State of Washington, (referred to as "THA") and CWD INVESTMENTS I LLC, a Washington limited liability company ("Owner") agree as follows:

THA and Owner are parties to a contract effective October 31, 2018, for the provision of providing affordable housing to low income students ("Agreement"). They agree to the following amendments to that contract as denoted by the redlining below:

**2. TERM OF AGREEMENT**

This Agreement is effective as of the Effective Date. Unless the parties terminate the Agreement earlier pursuant to its terms, the initial term of this Agreement is seven (7) years (the "Term"). The parties may renew or modify this Agreement by agreement in writing. Any extension must comply with MTW Requirements.

THA and Owner agree to extend the contract term through 2029. This extends the contract term from seven (7) years to eleven (11) years.

**8. TENANCY**

**8.1 Lease**

The tenant lease between the Owner and each Family (the "Lease") must be approved by THA. It shall comply with all THA requirements, MTW requirements and the laws of Tacoma, the State of Washington and the United States. The Lease shall be substantially in the form of Exhibit D. The term of the Lease shall be for one year and Owner is prohibited from renewing the Lease for more than two (2) additional consecutive lease terms for a maximum duration of three (3) years, unless waived by change in THA policy or a THA Executive Action in response to a natural disaster or pandemic. Tenants shall be notified of this limitation in their Lease. NOTE: This three year limit does not apply to the occupancy of Previous Tiki Residents who occupancy one of the seven (7) initial vacancies pursuant to section 7.1.2. The Lease shall require all Tenants to obtain renters' insurance and provide proof of the same to the Owner

All the other terms and conditions of the CONTRACT shall remain unchanged.

*[Signatures Follow]*



**TACOMA HOUSING AUTHORITY**

**CWD Investments**

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April Black  
ITS: Executive Director

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Chad Duncan  
ITS: Member and Manager

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**JRO Ventures I, LLC**

**JGD Investments I, LLC**

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Josh Obendorf  
ITS: Manager

---

John Duncan  
ITS: Manager

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**MJE Investments, LLC**

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Mark Evenson  
ITS: Manager

Date: \_\_\_\_\_

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair

# **Resolution 3**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (3)

**Date:** April 27, 2022

**To:** THA Board of Commissioners

**From:** April Black  
Executive Director

**Re:** Approval of Revision to THA's Administrative Plan: Local Preferences

---

*This resolution would authorize Tacoma Housing Authority (THA) to update its Administrative Plan to receive referrals from Pierce County's Coordinated Entry system to fill vacant units set aside for homeless families within THA's portfolio.*

### Background

On January 24, 2022, THA issues a Request for Proposals (RFP) for up to 25 project-based vouchers. THA received one response to the RFP. The proposal was scored based on:

Across its Portfolio THA has 102 units that must be filled by homeless families. These units are set aside for households with incomes ranging from 30-60% of AMI. 62 units are set aside for specific populations and are filled through THA's partners (Arlington & The Rise). For the remaining 40 units, THA queries its waitlist for families that meet the unit eligibility criteria. Because THA's waitlist is long, and homelessness status changes, the process of trying to fill units can result in providing false hope for families who end up ineligible. The leasing team especially struggles to identify larger families who meet the 30% AMI requirement.

In the past, THA filled these units by taking referrals from the Families In Transition program. THA's Administrative Plan details a waitlist preference to do so. This program no longer exists. Considering these units that are intended to serve people experiencing homelessness and HUD's support of PHAs developing homeless set-aside policies (Notice PIH 2013-HA), our aim is to revise current procedures so THA can be more efficiently connected with households experiencing homelessness in real-time.

Property Management, Client Support and Empowerment and Rental Assistance recommend reinstating our waitlist preference policy for families in the County's Coordinated Entry System. Providing a preference for these families would provide another avenue for THA to serve homeless families with more immediacy. We also understand that serving vulnerable households referred through CE may mean additional services are needed to stabilize the household, so our proposal aims to solidify partnerships with service providers.



# TACOMA HOUSING AUTHORITY

## Recommendation

Approve Resolution 2022-04-27 (3) authorizing revisions to THA's Administrative Plan (Chapter 4 section III.C.) to create a waitlist preference policy for families in Pierce County's Coordinated Entry System.



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (3)

### (Approval of Revision to THA's Administrative Plan: Local Preferences)

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 THA's voucher programs and is required by HUD; and

**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**, THA seeks to fill units set aside for homeless households in its portfolio with referrals from Pierce County's Coordinated Entry System; 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 that:***

THA's Executive Director is authorized to revise THA's Administrative Plan adding the following chapter for the administration of the local preferences:

#### **4-III.C. SELECTION METHOD**

PHAs must describe the method for selecting applicant families from the waiting list, including the system of admission preferences that the PHA will use [24 CFR 982.202(d)].

#### **Local Preferences [24 CFR 982.207; HCV p. 4-16]**

PHAs are permitted to establish local preferences, and to give priority to serving families that meet those criteria. HUD specifically authorizes and places restrictions on certain types of local preferences. HUD also permits the PHA to establish other local preferences, at its discretion. Any local preferences established must be consistent with the PHA plan and the consolidated plan, and must be based on local housing needs and priorities that can be documented by generally accepted data sources.

#### THA Policy

THA will select all households by date and time of application. There will only be preferences for the following:



- The Executive Director will, at his discretion, identify when, and if, to make a set number of HOP subsidies available in response to a federally-declared disaster. When these vouchers are made available, households that can document that they have been displaced by a presidentially declared Major Disaster Declaration (MDD) will be eligible for this preference. Displaced households will be able to apply, even if the waiting list is closed, and receive this emergency preference. In order to qualify the applicant must provide evidence that the family resided in the disaster area before occurrence. Eligibility will be verified by Tacoma Housing Authority. To demonstrate need the applicant may provide, as verified by FEMA, an assessment of damage to their property showing their pre-disaster residence is either uninhabitable or inaccessible. Applicant should provide documentation demonstrating a lack of, or insufficient insurance coverage to meet housing needs. Applicants must also meet PHA program eligibility requirements.
- The PHA will offer a preference to any family that has been terminated from its HCV program due to insufficient program funding.

~~• **THA will offer a preference to the Families in Transition program**~~

- **THA will offer a preference to eligible homeless households referred by Pierce County's Coordinated Entry system for its homeless set aside units.**
- THA will also offer preferences for RAD exits, PBV exits, displacement due to disaster, and transfers.
- THA will allow those on the transfer waitlist to be served ahead of those on the regular waitlist in accordance with Chapter 12 of THA's ACOP. As of July 1, 2020 THA may offer a Housing Choice Voucher subsidy to households on the transfer waitlist for the following reasons:

Emergency Transfer  
Reasonable Accommodation  
Over-housed  
Under-housed

Until a comprehensive transfer waitlist policy revision is completed, households that refuse a Housing Choice Voucher offer will remain on THA's transfer list.

When conducting a waitlist pull to fill units that are set-aside for specific populations (such as homeless families, families with children, senior and/or disabled families etc.) THA may contact each family to determine if they qualify for the unit based on their household composition prior to conducting a waitlist pull. If the family does not meet the specified set aside for the vacant unit or does not respond within 10 business days, THA may skip over the family. This process prevents THA from selecting applicants from the waitlist who are not eligible for the available unit(s).

THA will provide a special programs preference. This preference is given to applicants who have been approved to participate in a program for which THA has received a special allocation of vouchers.

When the waitlist is suspended or closed, applications from households who are being referred for these targeted or special assistance programs will continue to be accepted and placed on the waitlist. **This includes filling units that are set-aside for specific populations.** These applications will be processed in the order the referral was received from the partner agencies.

These targeted or special assistance programs are as follows:

**Veterans Administration – Supportive Housing (VASH)**

This program serves veterans experiencing homelessness. Households are referred by caseworkers at the Veteran’s Administration and must be actively engaged in case management services with the VA to be eligible.

**Youth & Family Special Programs**

These programs serve families with children who are homeless, at risk of homelessness, at risk of separation as a result of poor living conditions, exiting THA recognized emergency shelters or transitional housing, and survivors of domestic violence. Referrals are made from supportive service providers and government child welfare agencies that are operating under a written agreement with THA to provide housing search, crisis intervention, housing stabilization, and/or case management services to participants. Examples include Family Unification Program, CHOP and FYI.

**College Housing Assistance Program**

This program serves students who are homeless or at risk of homelessness who are enrolled in post-secondary education. Referrals come from higher education institutions that are operating under a written agreement with THA.

**Voucher Programs for Non-Elderly & Disabled Households**

THA administers a limited number of NED Vouchers which are utilized to serve households whose head, co-head or spouse is non-elderly and disabled who are transitioning from a nursing home or other healthcare institution. Referrals are made from agencies operating under a written agreement with THA and providing services to households.

THA administers a limited number of Mainstream Vouchers which are utilized to serve households with a disabled adult household member under the age of 62. For this allocation, the head, co-head or spouse does not have to have a disability. Qualifying applicants will be offered these vouchers in the following order:

- 1) Current residents in THA owned units with a disabled adult household member under the age of 62, but only during a specified time period designated by THA,

determined by agency need.

2) Current applicants on THA's waitlist with a disabled adult household member under the age of 62, but only during a specified time period designated by THA, determined by agency need.

3) Applicants referred by:

A consortium of partnering agencies that are operating under a written agreement with THA to provide services to participants. Referral applicants must have a disabled adult household member under the age of 62, and meet at least one of the following criteria:

- transitioning out of institutional and other segregated settings
- at serious risk of institutionalization
- previously experienced homelessness and currently a client in a permanent supportive housing or rapid rehousing program
- currently experiencing homelessness or at risk of experiencing homelessness during a specified time period designated by THA, determined by agency need.

Any public notice announcing a waiting list opening and application procedure will be simple, direct, and clear but with sufficient detail to inform applicants of the time and place to apply, any limitations on who may apply, and any other information the applicant may need to successfully submit the application. The notification process will also comply with HUD fair housing requirements, such as adopting suitable means to assure that the notice reaches eligible individuals with disabilities and those with limited English proficiency.

THA will select from the waitlist after the lottery in a sequential manner. Only those with a preference mentioned above will be eligible to be pulled before those on the waitlist.

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair

# **Resolution 4**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (4)

**Date:** April 27, 2022

**To:** THA Board of Commissioners

**From:** April Black  
Executive Director

**Re:** Extension of Project Based VASH Voucher Contract: Parkland Manor

---

*This resolution will extend by 10 years the Project Based VASH (PBVASH) Voucher Housing Assistance Payments contract for Parkland Family Vista LLC's property at Parkland Manor.*

### Background

Tacoma Housing Authority (THA) has been subsidizing Parkland Family Vista LLC's Parkland Manor through PBVASH assistance since January 2012. The project currently provides housing assistance to 4 units at this property. The original PBVASH contract expired in January 2022.

### Recommendation

Authorize an extension of THA's PBVASH Contract with Parkland Family Vista LLC's Parkland Manor for ten (10) years. With this extension THA will continue to provide project-based housing assistance for 4 units at Parkland Manor to house chronically homeless Veterans identified by the American Lake Veterans Administration.





# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (4)**

### **(Extension of Project Based VASH Voucher Contract: Parkland Manor)**

**WHEREAS**, THA has provided project-based housing assistance to Parkland Family Vista LLC's Parkland Manor property since 2012; and

**WHEREAS**, Parkland Family Vista LLC provides housing for low income, chronically homeless Veterans in the community; and

**WHEREAS**, a ten year extension will allow THA and Parkland Family Vista LLC to continue to provide housing assistance to low income, chronically homeless Veterans; and

**WHEREAS**, Failure to extend this contract would lead to a loss of affordable housing units; 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 execute an extension of THA's PBVASH Voucher Contract with Parkland Family Vista LLC for ten (10) years:

**CONTRACT EXTENSION AGREEMENT  
to the  
HOUSING CHOICE VOUCHER PROGRAM  
VETERANS ADMINISTRATION SUPPORTIVE HOUSING  
(VASH)  
PROJECT-BASED ASSISTANCE  
HOUSING ASSISTANCE PAYMENT CONTRACT FOR PARKLAND MANOR**

March 21, 2022

The HOUSING AUTHORITY OF THE CITY OF TACOMA, WASHINGTON, a municipal corporation/political subdivision of the State of Washington, (referred to as "THA") and Parkland Family Vista LLC (referred to as "GRANTEE") agree as follows:

1. THA and GRANTEE are parties to a ten-year (10) contract dated January 5, 2012, for the provision of project-based voucher assistance for the property of Parkland Manor on behalf of THA ("CONTRACT"). They agree to the following Contract Extension Agreement to that contract.

**2. EXTENSION OF CONTRACT TERM**

- 2.1 The original ten-year (10) contract effective date began January 5, 2012. THA and GRANTEE agree to extend this existing contract by an additional ten years (10) beginning January 5, 2022 and expiring on January 5, 2032.

**3. CONTRACTED UNITS**

**3.1 Exhibit A**

The parties to this contract executed a First Amendment to the original contract on November 23, 2018, and a Second Amendment to the original contract on May 19, 2019. These Amendment identify the units that THA provides payment for in the form of project-based voucher assistance. For the purposes of this Contract Extension Agreement to that contract, Exhibit A below identifies the contracted project-based units.

THA and GRANTEE agree the following units receive THA's project-based voucher payment:

| Unit Number | Unit Size |
|-------------|-----------|
| B104        | 1         |
| B202        | 3         |
| C109        | 1         |
| C208        | 2         |

**3.2** Tacoma Housing Authority agrees to pay HAP on the units listed in Section 3.1 of this Contract Extension Agreement in accordance with the original CONTRACT. All future adjustments in Rent to Owner will be pursuant to the requirements of and provisions set forth in the HAP Contract and all previous Amendments.

**4.** All the other terms and conditions of the CONTRACT shall remain unchanged.

*[Signatures Follow]*

**TACOMA HOUSING AUTHORITY**

**PARKLAND FAMILY VISTA LLC**

\_\_\_\_\_  
April Black  
Executive Director

\_\_\_\_\_  
Mieko Gray  
Interim CEO

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**Approved: April 27, 2022**

\_\_\_\_\_  
Stanley Rumbaugh, Chair

# **Resolution 5**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (5)

**Date:** April 27, 2022

**To:** THA Board of Commissioners

**From:** April Black  
Executive Director

**Re:** Extension of Project Based VASH Voucher Contract: Pacific Courtyard

---

*This resolution will extend by 10 years the Project Based VASH (PBVASH) Voucher Housing Assistance Payments contract for Metropolitan Development Councils (MDC) property at Pacific Courtyard.*

### Background

Tacoma Housing Authority (THA) has been subsidizing MDC's Pacific Courtyard through PBVASH assistance since January 2012. The project currently provides housing assistance to 8 units at this property. The original PBVASH contract expired in January 2022.

### Recommendation

Authorize an extension of THA's PBVASH Contract with MDC's Pacific Courtyard for ten (10) years. With this extension THA will continue to provide project-based housing assistance for 8 units at Pacific Courtyard to house chronically homeless Veterans identified by the American Lake Veterans Administration.





# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (5)**

### **(Extension of Project Based VASH Voucher Contract: Pacific Courtyard)**

**WHEREAS**, THA has provided project based housing assistance to MDC's Pacific Courtyard property since 2012; and

**WHEREAS**, MDC provides housing for low income, chronically homeless Veterans in the community; and

**WHEREAS**, a ten year extension will allow THA and MDC to continue to provide housing assistance to low income, chronically homeless Veterans; and

**WHEREAS**, Failure to extend this contract would lead to a loss of affordable housing units; 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 execute an extension of THA's PBVASH Voucher Contract with MDC for ten (10) years:

**CONTRACT EXTENSION AGREEMENT  
to the  
HOUSING CHOICE VOUCHER PROGRAM  
VETERANS ADMINISTRATION SUPPORTIVE HOUSING  
(VASH)  
PROJECT-BASED ASSISTANCE  
HOUSING ASSISTANCE PAYMENT CONTRACT FOR PACIFIC COURTYARD**

March 21, 2022

The HOUSING AUTHORITY OF THE CITY OF TACOMA, WASHINGTON, a municipal corporation/political subdivision of the State of Washington, (referred to as "THA") and Metropolitan Development Council (referred to as "GRANTEE") agree as follows:

1. THA and GRANTEE are parties to a ten-year (10) contract dated January 26, 2012, for the provision of project-based voucher assistance for the property of Pacific Courtyard on behalf of THA ("CONTRACT"). They agree to the following Contract Extension Agreement to that contract.

**2. EXTENSION OF CONTRACT TERM**

2.1 The original ten-year (10) contract effective date began January 26, 2012. THA and GRANTEE agree to extend this existing contract by an additional ten years (10) beginning January 26, 2022 and expiring on January 26, 2032.

**3. CONTRACTED UNITS**

**3.1 Exhibit A**

The parties to this contract executed a First Amendment to the original contract on May 8, 2019. This Amendment identifies the units that THA provides payment for in the form of project-based voucher assistance. For the purposes of this Contract Extension Agreement to that contract, Exhibit A below identifies the contracted project-based units.

THA and GRANTEE agree the following units receive THA's project-based voucher payment:

| Unit Number | Unit Size |
|-------------|-----------|
| A5          | 2         |
| A7          | 1         |
| C3          | 1         |
| C6          | 1         |
| D2          | 1         |
| D7          | 1         |
| E2          | 1         |
| F6          | 1         |

**3.2** Tacoma Housing Authority agrees to pay HAP on the units listed in Section 3.1 of this Contract Extension Agreement in accordance with the original CONTRACT. All future adjustments in Rent to Owner will be pursuant to the requirements of and provisions set forth in the HAP Contract and all previous Amendments.

**4.** All the other terms and conditions of the CONTRACT shall remain unchanged.

*[Signatures Follow]*

**TACOMA HOUSING AUTHORITY**

**METROPOLITAN DEVELOPMENT  
COUNCIL**

\_\_\_\_\_  
April Black  
Executive Director

\_\_\_\_\_  
Mieko Gray  
Interim CEO

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**Approved: April 27, 2022**

\_\_\_\_\_  
Stanley Rumbaugh, Chair

# **Resolution 6**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (6)

**Date:** April 27, 2022

**To:** THA Board of Commissioners

**From:** April Black  
Executive Director

**Re:** Intergovernmental Cooperative Purchasing Agreement with Housing Opportunities of SW Washington (HOSWWA) to Procure Real Estate Financial Services.

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*This resolution would authorize THA to use a financial analyst, J.H. Brawner & Company, that the Housing Opportunities of SW Washington (HOSWWA) has procured. THA would rely on Housing Opportunities of SW Washington (HOSWWA) procurement process. Doing this would spare THA the need to conduct its own procurement. State law permits this. We would do this with an Intergovernmental Cooperative Purchasing Agreement with Housing Opportunities of SW Washington (HOSWWA). This resolution also authorizes the executive director to execute the Intergovernmental Cooperative Purchasing Agreement.*

### Background

THA is completing financial analyses for several different projects, in addition to analyzing our capital plan and developing an acquisition strategy. We need the expertise of a third-party consultant to evaluate proposed transactions and recommend ways to ensure projects are financially viable. This type of consultant also guides THA on finding potential financing sources and maximizing the use of tax credits and rental income.

THA seeks this type of consultant for current and future projects. Housing Opportunities of SW Washington (HOSWWA) procured J.H. Brawner & Company, a well-regarded and respected real estate development advisor, and with whom THA has worked in the past.

Housing Opportunities of SW Washington (HOSWWA) follows a procurement process similar to THA's. THA would use an Intergovernmental Cooperative Purchasing Agreement with Housing Opportunities of SW Washington (HOSWWA) to allow THA to use the Brawner firm. Specific contracts will then be developed to detail the work and cost for each project. Immediate projects will include Housing Hilltop and an audit of THA's pipeline.

### Recommendation

Staff recommends approval of Resolution 2022-04-27 (6)





# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (6)

### **INTERGOVERNMENTAL COOPERATIVE PURCHASING AGREEMENT WITH HOUSING OPPORTUNITIES OF SW WASHINGTON (HOSWWA) TO PROCURE REAL ESTATE FINANCIAL SERVICES.**

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

**Whereas**, the Tacoma Housing Authority seeks to secure a consultant to assist in Real Estate Financial Services; and

**Whereas**, THA has previously utilized inter-local, cooperative purchasing agreements within- and out-of-state public agencies; and

**Whereas**, the real estate financial services needed by THA are available through the Housing Opportunities of SW Washington (HOSWWA) through a competitively bid contract with J.H. Brawner & Company; and

**Whereas**, Chapter 39.34 RCW The Interlocal Cooperation Act permits public agencies to cooperate and exercise joint powers in carrying out their public purposes, including the purchase of goods and services; and

**Whereas**, the THA routinely enters into Intergovernmental Cooperative Purchasing Agreements with other public agencies in order to reduce the cost of contracts and supplies; and

**Whereas**, the Housing Opportunities of SW Washington (HOSWWA) has used competitive bidding procedures which are substantially the same as THA's to obtain a reasonable and fair price for the Real Estate Financial Services needed by THA and is willing to enter into an Intergovernmental Cooperative Purchasing Agreement allowing THA to piggyback on their existing contract at a comparable price.

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

The Executive Director is authorized to sign an Intergovernmental Cooperative Purchasing Agreement with the Housing Opportunities of SW Washington (HOSWWA) substantially in the form attached for the purpose of securing the services of J.H. Brawner & Company to provide financial analysis and real estate development services.

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair



# TACOMA HOUSING AUTHORITY

## INTERGOVERNMENTAL COOPERATIVE PURCHASING AGREEMENT

Pursuant to Chapter 39.34 of the Revised Code of Washington State, the Housing Authority of the City of Tacoma and the Housing Opportunities of SW Washington (HOSWWA) hereby agree to the terms of this Intergovernmental Cooperative Purchasing Agreement for the use of the solicitation process in obtaining Real Estate Financial Services with J.H. Brawner & Company. The following terms and conditions are applicable to this Agreement:

1. Each party has agreed that Housing Opportunities of SW Washington (HOSWWA) has followed the HUD procurement process 2 CFR 200.317-200.326 and Housing Opportunities of SW Washington (HOSWWA) Procurement Policy in obtaining Real Estate Financial Services with J.H. Brawner & Company.
2. Each party has agreed that Housing Opportunities of SW Washington (HOSWWA) decision to contract with J.H. Brawner & Company is without prejudice and meets applicable laws and policies.
3. Each party has agreed to enter into separate contracts with J.H. Brawner & Company, with each contract having specific terms and agreements.
4. A party to this Agreement shall not accept responsibility for the performance of J.H. Brawner & Company contracted for by the other party as a result of this Agreement.
5. A party to this Agreement shall not be responsible for the payment of any item(s) or service(s) contracted for by the other party as a result of this Agreement.
6. This Agreement shall continue in force until cancelled in writing by either party.

IN WITNESS WHERE OF, the parties here to have executed this Intergovernmental Cooperative Purchasing Agreement by having their representatives affix their signatures below.

**TACOMA HOUSING AUTHORITY**

**Housing Opportunities of SW Washington  
(HOSWWA)**

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Executive Director

Date: \_\_\_\_\_

Date: \_\_\_\_\_

# **Resolution 7**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (7)

**Date:** April 27, 2022  
**To:** THA Board of Commissioners  
**From:** April Black, Executive Director  
**Re:** Sunsetting the Housing Opportunity Program (HOP)

*This resolution would sunset the Housing Opportunity Program (HOP) through transfer to the Housing Choice Voucher program (HCV) and through program attrition.*

### Background

Tacoma Housing Authority (THA) developed the [Housing Opportunity Program \(HOP\)](#) subsidy model in 2013. At that time, THA was seeking ways to serve more households with less.

To achieve this aim, THA developed HOP. Any new incoming household would receive a HOP subsidy instead of a traditional [Housing Choice Voucher \(HCV\)](#), formerly known as Section 8. The value of a voucher is based on a payment standard set by THA. When setting the payment standard, THA considers the Fair Market Rents which are determined by Housing and Urban Development (HUD). The payment standards are set between 90 and 110% of the Fair Market Rents. Currently, they are 100% or equal to the Fair Market Rents for all bedroom sizes.

The HOP subsidy is worth 50% of the payment standard.

Traditional Housing Choice Vouchers are income-based. That means the value of the voucher depends on the household's income. With HCV, households *usually* spend 30% of their income on rent. In cases where a household's rent is above the payment standard, the difference is added to the family's share.

The following table outlines primary differences between HOP and HCV.

| Housing Opportunity Program  | Housing Choice Voucher   |
|--|--|
| <b>Fixed Subsidy:</b> THA pays 50% of the payment standard. The household pays the remaining housing costs.                            | <b>Income-based Assistance:</b> The household pays ~30% of income on rent. THA pays the remaining housing costs. If rent is more than the payment standard, the household pays the difference. |
| <b>Voucher Size:</b> Based on 2 people per bedroom. Adjusted if household size decreases. Does not adjust if household size increases. | <b>Voucher Size:</b> Based on 2 people per bedroom. Adjusted if a household size decreases OR increases.   |
| <b>Time Limit:</b> No time limit for elderly/disabled households. 5-year limit for work-able households.                               | <b>Time Limit:</b> No time limit for all households.   |

| Housing Opportunity Program   | Housing Choice Voucher  |
|---|---|
| <b>Recertification:</b> Annual recertification. Clients self-certify income.                  | <b>Recertification:</b> Elderly and disabled households: every 3 years. Non-elderly or disabled households: every 2 years. Clients provide income documentation.  |
| <b>Changes in Income:</b> The subsidy amount will not change if a household's income changes. | <b>Changes in Income:</b> Increases of 20% or more - the subsidy decreases at the household's next re-certification (every 2-3 years). The subsidy will increase if there is a sustained loss of income of more than 20%. |

Over the past year, THA has been analyzing programmatic outcomes among HOP households in comparison to HCV households. The following sections summarize our research:

- ***Securing Housing with a Voucher***

HCV households were more likely to secure housing than HOP households (82% compared to 64%). Extremely low-income households with a HOP subsidy were twice as likely to be unable to secure housing than HCV households.

Over the last few years, Black, Indigenous, and People of Color (BIPOC)-headed households were less likely to find housing with a HOP subsidy compared to white households with a HOP subsidy. BIPOC households in the College Housing Assistance Program (CHAP) and Child Housing Opportunity Program (CHOP) were also less likely to secure housing than white households in the programs.

- ***Changes in Income***

HCV households were more likely to experience an increase in income (67%) than HOP households (54%) while receiving assistance. 85% of HCV households defined as "work able" (not elderly or disabled) increased their income by the time they exited compared to 60% of "work able" HOP households. These households were THA clients at roughly the same time period and for similar lengths of assistance. The average HCV household's income increased nearly 200% while HOP household's income increased by 33%.

BIPOC HCV households were more likely to experience an increase in income than any other population. BIPOC households were less likely to experience an increase in income if they were participating in CHAP or CHOP.

- ***Program Exits***

HCV households were twice as likely to exit under positive circumstances (achieving self-sufficiency, purchasing a house, etc.) than HOP households. HCV households have the highest proportion of positive exits and the lowest proportion of negative exits (evictions, being terminated from the program).

Achieving self-sufficiency (i.e. graduating off of the program to unsubsidized housing) is as common as eviction or death for households using a HOP subsidy. Conversely, self-sufficiency is the third most common reason HCV households stopped receiving THA's assistance.



- ***Rent Burden***

*Rent burden* is the proportion of income a household spends on housing. Households that spend more than 50% of their income on housing costs are “severely rent burdened.” HOP households are twice as likely to experience severe rent burdens, even with a subsidy. *Market rent burden* is how much of a household’s income is spent on housing without THA’s assistance.

HOP households are more likely to exit with a severe market rent burden than HCV households. Households headed by BIPOC women (who make up the largest proportion, roughly 50%, of THA’s voucher holders), are twice as likely to exit with no market rent burden from the HCV program than from HOP.

- ***Racial Equity Impact***

Across nearly all demographic groups, households served by a traditional Housing Choice Voucher experienced more positive programmatic outcomes. Most significantly, the disparities that are observed in the HOP program are often reduced, if not entirely reversed, when compared to the HCV population. For instance, while both BIPOC and white households have greater success securing housing on HCV, the disparity is great on HOP (a difference of 3 percentage points compared to 7 percentage points).

## Summary of Public Comment

After internal stakeholder consultation, research, and analysis, THA developed our recommendations and posted them for public comment from February 7, 2022 – March 11, 2022.

During this comment period, Policy, Innovation, and Evaluation (PIE) engaged with the public in the following ways:

- Posted notice of the public comment period on THA’s website and through multiple postings on THA’s social media accounts.
- Emailed notification to all THA staff.
- Emailed and texted notification of proposed changes to all HOP households.
- Fielded a multiple-choice survey for any member of the public to share their preferences.
- Hosted two virtual public forums for members of the community to learn about the proposed changes and ask questions.
- Presented the research and proposed changes to the following stakeholder groups:
  - Northwest Justice Project
  - Tacoma Pierce County Coalition to End Homelessness
  - Continuum of Care Executive Committee
  - Tacoma Urban League
  - THA’s Landlord Advisory Committee
  - DCYF and the Family Recovery Court
  - Tacoma Community College
  - University of Washington, Tacoma
  - The REACH Center
  - Northwest Education Access
  - Clover Park Technical College

- Pierce College
- Collected general comments and questions via email.

37 comments were submitted to the THA website for public comment.

| <b>Which group do you represent?</b>                          | <b>Count</b> |
|---|--------------|
| HOP Participant   | 24           |
| CHAP or CHOP Participant                                      | 5            |
| Other THA Client  | 1            |
| Representative of a Community Organization/Partner/Non-Profit | 2            |
| Tacoma Community Member                                       | 3            |
| THA Employee  | 1            |
| (blank)   | 1            |
| <b>Total</b>  | <b>37</b>    |

Overall, the public and community partners strongly supported these changes and were able to cite specific ways an income-based subsidy that is not time-limited would have/will benefit their constituents.

*Having worked with HOP voucher reviewing as a Housing Case Manager I agree that HOP vouchers are not as efficient at helping families as HCV. HOP vouchers are also more difficult to use and harder for landlords to understand. The 5 year limit only serves to guarantee a return to homelessness for families who are not financially viable at the 5 year mark. A natural disaster or family emergency can happen at any time and furthers the risk for these families to lose everything. Please convert HOP vouchers to Housing Choice Vouchers and remove the time limit.*

– Representative of a Community Organization/Partner/Non-Profit

*I feel the HOP does not work for our clients and moving to the traditional income based voucher is best bet for our clients. 5 years is not sufficient time for someone to recover from Trauma and basing the amount of the HAP on income is more beneficial to our clients.*

– THA Employee/Former HCV Client

While some understood why HOP was originally designed and implemented, they noted that “thinning the soup” is beneficial up until the point that it is no longer enough to sustain people.

The vast majority of current HOP households expressed support for the changes and offered insight as to how these changes would bring them significant benefit:

*For myself, I can see now the added worry & stress has exacerbated my mental illness to a fear based unsure future. T.H.A. & others alike are at the root of my drive, successes, & self sufficiency. I have lots of work to do but taking that FEAR of homelessness off my mind gives me the hope and the motivated attitude to rebuild my confidence.*

– HOP Client

*Though I am tremendously grateful for the opportunity THA has given my family and I to be on the HOP program, as a single mother of two, who works full time i find that I am*

*still struggling a lot to stay afloat to provide living paycheck to paycheck during these hard times now that the housing market has skyrocketed. It's even more overwhelming to know that it will end in a couple of years assuming the market will stay the same for a while to come or even raise higher. This would be an even bigger blessing not only for my family but for many other families who are struggling during this trying time if THA changed the HOP voucher into a traditional one while also eliminating the 5 year time limit! WOW you go THA! I thank you for even considering this and giving me the opportunity to give feedback on this matter.*

*– HOP Client*

*As a HOP participant, in a way it's great to have something to fall on so you won't have to worry about having a roof over your head for yourself and your child(ren). However, the flat rate does not make sense since income can fluctuate regularly. I got my Associate's degree while being in the program but having a hard time finding work and the program is supposed to end for me December 2022. HOP program is not something to rely on when you have low income, fixed income or if your income changes periodically. If this program converts to Section 8, it would be better for people in my situation.*

*– HOP Client*

*I am currently on the HOP program and am 62 and disabled but am on a 5 yr term limit as I have my 25 yr old son living with me. one of my problems is I'm on a fixed income of prox 861. per month and this year my rent increased almost 300.*

*– HOP Client*

*...we are battling so much right now as a community. Just reading that this change might happen...teared me up! How great would it be if I could KNOW that I can keep a roof over our heads. I cannot imagine others' burdens but can explain that I am often depressed over basic living questions and whether or not we will make it. You won't just see debt to rent decrease but it is what you WON'T see that will make the biggest difference. ... When you can check off housing, you begin to develop hope, pride and confidence. This changes a person's mental health which creates ability, opportunities and fills families with self-pride, courage and stability!! Reducing stress also reduces violence, addiction and many mental and depressive disorders while also promoting mental health and job stability for able workers. It's a win win!!*

*– HOP Client*

*I believe that the proposed changes are amazing. Being a current HOP recipient who is currently on an extension I feel like I wasn't able to accomplish the things I set out to do when I was selected for this program, I've had to face many hardship and difficulties that I just have not been able to really feel secure to do the things I need to be able to exit the program with confidence as expected. ... I feel like my whole 5 years was used navigating problems Instead of setting myself up for stability. I really hope these changes go into effect and help out current voucher holders like myself so that we can accomplish the mission of owning our own home and living a life of stability I would love to give my kids the future they deserve and accomplish.*

*– HOP Client*

Only one HOP household expressed a desire for the program to remain the same:

*I have been very satisfied with my HOP voucher and had no issues with it. I would not like changes proposed to be enacted. – HOP Client*

Other commenters brought up questions about how the changes would effect client experiences and whether or not the changes increase the number people served.

*.. will this change the quality and location of housing chosen by clients?  
– HOP Client*

*How will the increased subsidies and elimination of time limits increase the number of families served?  
– Tacoma Community Member*

In response to the questions, we would expect that an income-based subsidy would allow extremely low-income households to select from a wider range of housing options as more units would be affordable. In terms of increasing the number of people served, the latter question focuses on quantity as opposed to quality. THA's goal is not simply to serve as many people as possible, but to ensure that when THA pulls from the waitlist we are ensuring the household is given the support needed to actually secure housing and achieve the stability necessary to pursue economic stability and mobility.

A question did arise during public comment that PIE staff recommend addressing through these program changes. Tenants using property-based subsidies (PBS) raised concern that the proposed changes would not apply to or benefit their circumstance even though they experience many of the same challenges. PBS clients receive a flat amount for rental assistance based on their AMI limit and, at the properties serving CHAP students, they are faced with a 3-4 year time limit which many expressed was not enough to support their longterm educational goals (nationally, the average time to complete a two-year degree is 5.5 years). In order to continue to receive assistance they would have to become homeless or near-homeless to re-apply.

## **Recommendation**

This resolution recommends adopting Resolution 2022-04-27 (7) to sunset the Housing Opportunity Program (HOP). Effective May 1, 2022, THA will no longer issue any new HOP subsidies.

Through a phased implementation plan, current HOP households, including participants in CHAP and CHOP, will have their housing assistance payment (HAP) calculated using the same income-based formula used for the Housing Choice Voucher (HCV) program. When/if a household moves or relocates they will be transitioned to the HCV program.

This resolution also recommends that households on HOP and CHOP no longer be subject to time limits. Additionally, for CHOP, the resolution recommends eliminating all non-housing related program requirements to align with national best practices around child reunification.

THA continues to consult with our education partners regarding CHAP. This resolution limits its recommendation to changing how rental assistance is calculated and makes participants subject to

HCV program rules in addition to special program rules. However, a future resolution may be brought forth to amend the time limits or other special program requirements as a result of continued discussions with partner institutions.

THA's property-based subsidy program has provided an innovative way for extremely low-income households (usually at or below 30% AMI) to receive a fixed, time-limited subsidy without becoming THA clients. Given what we have learned about the efficacy of fixed, time-limited subsidies, paired with the goal to develop more consistent program operations and equitable program outcomes, this resolution recommends working with property-based subsidy partners to modify our existing contracts with the intent to ensure households have adequate time and resources to work towards self-sufficiency while benefiting from THA's rental assistance.

Additionally, the resolution recommends allowing HCV households with significant rental barriers to rent from relatives (this is currently permitted under HOP but not HCV).





# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (7) (Sunsetting the Housing Opportunity Program)**

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 Opportunity Program (HOP) and is required by HUD; and

**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**, Tacoma Housing Authority's Housing Opportunity Program (HOP)'s flat subsidy and 5 year time limit has demonstrated less successful programmatic outcomes in comparison to the Housing Choice Voucher program (HCV); and

**WHEREAS**, Tacoma Housing Authority seeks to improve the likelihood of securing housing and achieving self-sufficiency for the households served; and

**WHEREAS**, Tacoma Housing Authority aims to align the Child Housing Opportunity Program (CHOP) with national best practices around child reunification; and

**WHEREAS**, staff consulted a wide array of program participants, landlords and community members; 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, that:***

THA's Executive Director is authorized to revise THA's Administrative Plan Chapters 15, 17, and 18, related to the Housing Opportunity Program in the following ways:

| Policy Proposal   | Administrative Plan Section Requiring Revision  |
|---|---|
| <p><b>INTENT TO SUNSET PROGRAM</b></p> <p>Effective May 1, 2022, THA will no longer issue new HOP subsidies. HOP households (excluding CHAP) will no longer be subject to the five-year time limit.</p> <p>Using a phased implementation plan (see <i>New Section</i>: Chapter 18 PART XXV SUNSETTING THE HOUSING OPPORTUNITY PROGRAM in THA’s Administrative Plan) HOP households will be transferred to the HCV program if and when they have a qualifying event that requires THA to end their current HOPP contract (i.e., relocation, move, or port).</p> <p>Remaining households will stay on HOP and be subject to the same rules and rent calculations used for the Housing Choice Voucher Program. The effective date of the new rent calculation and rule change will be determined when a qualifying event triggers a recertification (i.e., annual recertification, landlord requested rent change, or change in household composition).</p> <p>All HOP households are expected to be subject to the new rent calculation and program rules no later than December 31, 2023</p> | <p>CHAPTER 18-<br/>HOUSING<br/>OPPORTUNITY<br/>PROGRAM</p> <p><i>New Section –</i></p> <p>PART XXV<br/>SUNSETTING THE<br/>HOUSING<br/>OPPORTUNITY<br/>PROGRAM (HOP)</p> |
| <p><b>HOP TRANSFERS TO HCV</b></p> <p>Current shoppers and HOP households that move, relocate, or port-out will be transferred to the Housing Choice Voucher (HCV) program in a phased approach based on the following <u>proposed</u> timeline:</p> <ul style="list-style-type: none"> <li>Beginning June 1, 2022, all active shoppers on HOP, CHOP, CHOP FRC, &amp; CHAP will be re-briefed and issued an HCV.</li> <li>Beginning July 1, 2022, current HOP households who move, relocate, or request to port-out (events that warrant a new voucher to be issued) will be transitioned to HCV at the effective date of those actions.</li> </ul>   | <p><i>New Section –</i></p> <p>18.XXV.A HOP<br/>TRANSFERS TO<br/>HCV</p>  |

| <b>Policy Proposal</b>   | <b>Administrative Plan<br/>Section Requiring<br/>Revision</b>                               |
|--|---|
| <p><b>HOP RENT RECALCULATION &amp; RULE CHANGE</b></p> <p>Current HOP households who do not move or relocate will remain on the HOP program to ensure they do not experience a disruption to their housing. The family's share of rent and THA's housing assistance payment (HAP) will be recalculated based on the household's income (see Chapter 6 Part III of the Administrative Plan). These households will also be subject to the same rules used for the Housing Choice Voucher (HCV) program in a phased approach based on the following <u>proposed</u> timeline:</p> <ul style="list-style-type: none"> <li>Beginning July 1, 2022, landlord requested rent changes and household composition changes will trigger a recalculation and rule change at the effective date of those actions.</li> <li>Beginning September 1, 2022, all other households will undergo rent recalculation and rule change at the date of their next recertification.</li> </ul> | <p><i>New Section –</i></p> <p>18.XXV.B HOP RENT RECALCULATION &amp; RULE CHANGE</p>        |
| <p><b>HARDSHIP FOR HOUSEHOLDS WHOSE HAP WILL DECREASE</b></p> <p>Households that will experience a decrease in THA's housing assistance payment (HAP) at the time at the time they transfer to the HCV program or undergo an income-based rent recalculation will have a three-month grace period during which THA's HAP will not change.</p> <p>If the household's new share of the rent exceeds the contract rent, they will be subject to receive zero HAP for up to six months under the new program rules (see 12-I.B. FAMILY NO LONGER REQUIRES ASSISTANCE [24 CFR 982.455]), yet they will still receive their previous HAP for the first three months of the six-month period. If the household's circumstances change during that, they may request an interim recertification to have the HAP reinstated.</p>  | <p><i>New Section –</i></p> <p>18.XXV.C HARDSHIP FOR HOUSEHOLDS WHOSE HAP WILL DECREASE</p> |
| <p><b>CHOICE MOBILITY</b></p> <p>Effective, May 1, 2022, households exercising Choice Mobility will be offered a Housing Choice Voucher.</p>   | <p>17-VII.C. CHOICE MOBILITY</p> <p>17-XI.F. CHOICE MOBILITY</p>                            |

| <b>Policy Proposal</b>   | <b>Administrative Plan Section Requiring Revision</b>  |
|--|--|
| <p><b>RENTING FROM RELATIVES</b></p> <p>THA will seek authorization to expand our authorization from the 2014 MTW plan to allow HCV households to rent from relatives when:</p> <ul style="list-style-type: none"> <li>• A household cannot lease up because of poor credit</li> <li>• A household would rely on the relative to help with childcare</li> <li>• A household with poor rental history has remediated the root causes of for the bad rental history</li> <li>• A household cannot lease because of poor criminal history that has shown proper rehabilitation</li> </ul> | <p>Chapter 15 PART IV: SHARED HOUSING [24 CFR 982.615 through 982.618] 15-IV.A. OVERVIEW</p> |
| <p><b>CHILDREN’S HOUSING OPPORTUNITY PROGRAM REQUIREMENTS</b></p> <p>Effective May 1, 2022, THA will no longer require that participants in the Children’s Housing Opportunity Program (CHOP) and Family Recovery Court (CHOP FRC) meet non-housing related requirements for continued eligibility. These households will be held to the same program requirements as households in the Family Unification Program (FUP).</p>  | <p>Chapter 18 PARTXXIII: FAMILY OBLIGATIONS 18-XVI.B. FAILURE TO COMPLY</p>                  |

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair

# **Resolution 8**





# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (8)

**Date:** April 27, 2022  
**To:** THA Board of Commissioners  
**From:** April Black, Executive Director  
**Re:** Approval of Project-based Voucher Contracts

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*Tacoma Housing Authority (THA) issued a Request for Proposals for project-based vouchers. This resolution will award project-based vouchers to Pioneer Human to serve people exiting corrections.*

### Background

On January 24, 2022, THA issued a Request for Proposals (RFP) for up to 25 project-based vouchers, with preference for housing providers who serve people recently released from incarceration. The intent of these project-based vouchers is to replace the 25 HOP subsidies that have been set aside for students exiting corrections (see Appendices A and B).

THA received one response to the RFP. The proposal was scored based on:

- For existing housing units, the extent to which units are occupied by families that are eligible to participate in the PBV program
- Extent to which services for special populations are provided onsite or in the immediate area
- Extent to which the project furthers THA's goal of deconcentrating poverty and expanding housing and economic opportunities
- Overall project viability
- Percentage of assisted units in the property – the lower the percentage the higher the score
- Additional points were awarded for projects serving households below 30% of area median income (AMI), working households and serving special needs populations.

The following includes a summary of the proposals and their rankings:

| <b>Respondent</b>      | <b>Project Name</b>           | <b>Brief Project Description</b>   | <b>Request</b> | <b>Ranking</b> |
|------------------------|-------------------------------|--|----------------|----------------|
| Pioneer Human Services | Exley & St. Helens Properties | The Exley and St. Helen's apartments are located in downtown Tacoma at 303 and 309 South 9 <sup>th</sup> Street. The properties service low-income households with criminal histories. Referral streams include the Department of Corrections, the college Re-Entry Navigator (based out of TCC but serving all community colleges in Pierce Co.), Coordinated Entry, and self-referral. The properties provide on-site case management and supportive services. These vouchers will be used to serve new and existing households with incomes below 50% of AMI. | 12             | 1              |

The RFP review committee recommends awarding project-based vouchers to Pioneer Human Services.

As transitional housing,<sup>1</sup> Pioneer maintains a 24-month maximum on tenancy, ensuring consistent turnover in units. After one year of tenancy at the properties, tenants would be eligible for a Choice Mobility voucher. This would allow them to retain their rental assistance and lease up on the private market. Employing Choice Mobility will help ensure participants have access to long-term housing assistance while also supporting unit turnover so that units are made available on a somewhat consistent and regular basis.

With approval of this resolution, THA will begin negotiating contracts with Pioneer Human Services. The contract terms will be up to fifteen (15 years).

## **Recommendation**

Approve Resolution 2022-04-27 (8) authorizing THA's Executive Director to execute Project-based Voucher (PBV) Housing Assistance Payment (HAP) contracts with Pioneer Human Services.

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<sup>1</sup> Traditionally, PHAs are not permitted to PBV transitional housing. However, THA has used our Moving to Work (MTW) flexibility to allow us to PBV transitional housing. See Activity 3 (page 27) of THA's 2011 MTW Plan.



# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (8)** **(Approval of Project-based Voucher Contracts)**

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

**WHEREAS**, Pioneer Human Services is the highest scoring respondent and will be awarded up to 25 project based vouchers; and

**WHEREAS**, Pioneer Human Services is an established, qualified service provider for people exiting corrections; and

**WHEREAS**, The effective date of each contract will be up the discretion of the Executive Director; and

**WHEREAS**, Each contract will be negotiated with the property and will be in effect for up to fifteen years (15); 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 execute Project Based Voucher (PBV) Housing Assistance Payment (HAP) contracts with Pioneer Human Services.

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair



# Tacoma Housing Authority

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**To:** April Black, Executive Director  
**From:** Katie Escudero, Interim Director of PIE  
Jess Thompson, Project Manager II  
**Date:** February 8, 2022  
**Re:** Re-entry Housing Proposal (DOC-CHAP voucher set-aside)

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## Background

Over the past few years Tacoma Community College (TCC) and Tacoma Housing Authority (THA) have held discussions around expanding the College Housing Assistance Program (CHAP) to serve students who began their post-secondary studies in prison and intended to continue their education at TCC upon release. This expansion was proposed because TCC was one of three schools in the state to administer the Second Chance Pell Grant Pilot Program at the Mission Creek Corrections Center for Women (MCCCW) and the Washington Corrections Center for Women (WCCW). This provided a unique opportunity to serve justice-involved students interested in pursuing an Associate's or Bachelor's degree.

However, as CHAP ramped up and went from serving 75 households with tenant-based subsidies to serving nearly 300 with the addition of property-based subsidies, the expansion to serve students exiting the Department of Corrections (DOC) was delayed. As TCC worked in collaboration with Corrections Education and Re-entry staff to develop program plans and proposals, a couple of external evaluations were being conducted which raised a few red flags about participants' experiences and outcomes on CHAP. Specifically, we were learning that the majority of students who applied and were accepted to CHAP were never successful at leasing up. Additionally, many of the participants were being exited from the program for being unable to meet program requirements. Expanding the program to students releasing from prison would require that the program would be designed in a way that required robust supports and supportive landlords.

Though TCC, DOC, and THA continued to explore DOC-CHAP, the COVID pandemic brought about a major disruption. The potential challenges and barriers that were already coming up in conversations around DOC-CHAP were only magnified as staff had to begin to take into consideration what program administration would look like if solely online and what would the student experience be like if it allows for only virtual participation (from a population that might not have the equipment or technical literacy required). THA was left questioning if we wanted to be a position to terminate assistance in cases where someone was a good tenant, abiding by the conditions of their community supervision (if they were under supervision to begin with), but are unsuccessful on the academic front despite their best efforts.

In the end, the PIE team assessed this approach and determined it inadvisable to move forward with DOC-CHAP for the following reasons:

- Corrections Education programs are intended to graduate a person prior to release. We have not been able to get figures on how many people exit midway through their post-secondary career.
- This population is already eligible to participate in the CHAP program. The definition of homelessness includes students exiting a correctional facility without a housing plan. We have not been able to determine the value of offering these vouchers in a separate, standalone program.
- The re-entry navigators at the college serve all two-year schools in the county. We do not believe it is wise to limit eligibility to only students attending TCC. Additionally, we were advised by subject matter experts at the Vera Institute that a partnership with a technical college might be more appealing to participants.
- More generally, CHAP is not demonstrating positive outcomes for the general student population. We do not advise expanding a program that has not proven successful, especially with a population that faces even greater systemic barriers.
- As a result of COVID, college coursework and processes have largely moved online. This presents an additional barrier as it requires the technical know-how and experience to navigate a predominately online educational experience. People exiting prison may not have the necessary skills to participate in online education effectively and successfully without supplemental support and resources.

## Partnership Exploration

Once PIE determined that DOC-CHAP, as originally envisioned, might not be the best approach, staff consulted with the housing department of DOC. PIE staff were interested in learning about other potential referral pathways and more immediate ways to utilize these subsidies while getting clearer on the needs and barriers of the diverse populations exiting the criminal justice system. Despite a shared interest in serving this population, PIE staff did not feel the partnership was a strong fit for the following reasons:

- DOC was primarily interested in housing support for the time in which the individual is under their case management or supervision. Whereas THA aims to provide longer term housing support that stabilizes households and provides opportunities to strive towards long-term goals, such as education and good wage-earning jobs.
- Re-entry navigators only provide case management for 12-18 months. After that period, the participant does not receive access to case management.
- Given the lessons learned from CHAP and other “boutique” programs, it was important to THA staff that a program and partnership in this arena be led by the service provider with THA doing what we do best – providing the housing dollar. We sought to quickly get something stood up, but it became clear that THA would need to lean in heavily to design something new for a relatively small population.

## PBV Proposal

PIE and Rental Assistance (RA) staff have been discussing alternative approaches to serving people exiting or having recently exited corrections.

Our proposal is to partner with a service provider that has housing units that can be dedicated to the re-entry population. Leases at the property will be time limited to ensure unit turnover. However, residents who have been successful in the program but unable to compete on the rental market without housing assistance, will be offered a move-on voucher to rent on the private rental market. If the changes to HOP are approved, staff anticipate that an HCV move-on voucher will help minimize the financial burden associated with renting in Tacoma. Additionally, we are seeking a service provider that will continue to provide some support and limited case management to participants who have moved out.

PIE and RA staff recommend using the set-aside subsidies in this way for the following reasons:

- The proposal addresses immediate and long-term housing options.
- Supportive services and case management is already available and not time limited.
- Income-based subsidies help ensure people recently exiting jail or prison who are not yet employed can afford rent. It also provides some cushion should they want to pursue post-secondary pathways or job training.
- With a move-on voucher, households should be able to transition to the private market without experiencing a significant increase in rent.
- Participants can build rental history, reducing a barrier to renting on the private market.
- The interested service provider has an established referral source and currently takes referrals from DOC, TCC, and other agencies working with people exiting corrections.

We have released an RFP for up to 25 project-based vouchers set to close March 4, 2022. We have at least one interested party that we expect to respond to the RFP.





[Insert Resolution 2018-05-23 (5)]



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2018-05-23 (5)

**Date:** May 23, 2018  
**To:** THA Board of Commissioners  
**From:** Michael Mirra, Executive Director  
**Re:** Approval for up to 50 Project-Based Vouchers for the College Housing Assistance Program (CHAP)

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*THA's Board of Commissioners approved resolution 2017-06-28 which increased the number of rental subsidies available for the College Housing Assistance Program to 150 households. This resolution would approve the conversion for up to 50 College Housing Assistance Program tenant based vouchers to project-based vouchers, if necessary.*

### Background

The Tacoma Housing Authority (THA), in partnership with Tacoma Community College (TCC), administers the College Housing Assistance Program (CHAP). CHAP provides eligible TCC students who are homeless, or at-risk of becoming homeless, with rental assistance. The pilot program—which provided 25 vouchers to homeless students—has been expanded to 150; 25 of those vouchers are allocated to formerly incarcerated students who have participated in a postsecondary education program while incarcerated. Throughout this memo, CHAP participants who will enroll into the re-entry expansion will be referred to as Opening Doors participants.

The program model presumes that program participants with tenant based rental assistance can find housing reasonably close to the TCC campus. They can no longer do this in Tacoma's new housing market of higher rents and lower vacancies. Opening Door participants face even more challenges in finding housing because of their criminal history and incarceration.

In response, THA and TCC propose to project-based housing vouchers into rental housing in Tacoma that then would be dedicated to all participants in the TCC program. This resolution, if the Board approves it, would allow for that. In ways described below, THA and TCC consulted with community stakeholders to inform this proposal.

Here are the factors that support the need to shift this portion of the program from a tenant-based voucher to a project-based voucher model.

1. Tacoma faces a crisis shortage of affordable housing. The increases in rent are being driven by the growing number of people living in Pierce County, which—along with the



neighboring King and Snohomish counties—have seen the population grow to nearly 3.9 million residents.<sup>1</sup> In addition to population growth which makes the private rental market more competitive; there is a shortage of affordable homes with an average of 29 available affordable homes per 100 extremely low-income renter households<sup>2</sup>. In Tacoma's current market, an annual income of \$49,177 is needed to afford a two-bedroom rental at Housing and Urban Development's (HUD) Fair Market Rent; while the average earned income for current CHAP participants is \$8,638. The influx of new residents are driving rent increases and creating a shortage of affordable housing adversely impacting those who are often in the greatest need for safe and affordable housing.

2. This housing shortage affects TCC applicants to the CHAP. During the application process, 47% of CHAP applicants are withdrawn from the waiting list before they are even issued a voucher. In most cases, this is because the applicant is no longer enrolled in courses at TCC. While the data does not tell us why these students are dropping out, we do know that housing is fundamental in maintaining stability. To date, there have been 212 CHAP applicants. Of the CHAP applicants who have been issued vouchers nearly a quarter of them were unable to utilize their voucher. CHAP applicants who have successfully utilized their voucher do so with an average time between voucher issuance and lease up being 54 days. This may be skewed to represent shorter shopping times as several CHAP applicants already had a place of residence. Taking a look at CHAP applicants that are currently shopping, the average shopper has been looking for 105 days. The data shows that CHAP applicants are struggling to not only lease up, but for those who have leased up are shopping for housing for three months or more.
3. Formerly incarcerated students face additional challenges because of their criminal justice system involvement. These challenges show in several ways. **First**, a recent of THA landlords assessed their screening practices. So far, the survey resulted in 88 responses. The results show that 64 percent of landlords always conduct criminal background screenings with 30 percent looking back indefinitely. Only 18 percent of landlords reported that they do not conduct criminal background screenings. All other screening qualifications aside, future Opening Doors participants who will have just exited prison, are already disqualified from many rentals in Tacoma. This survey also asked if a landlord has ever rented to someone with a criminal background, and if so, what led them to approve the application for tenancy; and many responded that applicants had enough time between their conviction and the time of application (as well as demonstrated rehabilitation). Applicants just exiting prison have not had the opportunity to build credibility by these standards.

**Second**, in addition to the criminal background barrier, all program participants would need to demonstrate their suitability as a tenant just as any renter would be required. Those who are just being released from incarceration or attempting to exit homelessness may not have rental history, credit history, and/or employment. Participation in CHAP is

<sup>1</sup> <http://www.thenewstribune.com/news/business/article206326214.html>

<sup>2</sup> National Low Income Housing Coalition – 2018 Washington Housing Profile – February 26, 2018



actually an opportunity for participants to demonstrate rehabilitation and build positive rental history.

**Third**, “(s)erving [prison] time also seems to have a detrimental impact on the quality of housing as those recently returned home often report living in less healthy conditions than before their imprisonment.”<sup>3</sup> Since housing choice is limited, those without support will often be left with taking whatever they can find. Safe, healthy housing is important for personal development and provides an environment where an individual can focus on self-improvement.

**Fourth**, it can take a long time for even the average CHAP participant to acquire all the necessary documents to ensure program eligibility, in addition to the long time that will inevitably be spent shopping for housing. The time all this takes is exhausting and critical for any homeless student. It can be particularly daunting for Opening Doors participants. They commonly must have housing as a part of their DOC/court ordered obligations. To help ensure a successful transition from release into housing and education, Opening Doors participants need immediate access to housing. Taking a note from the challenges seen with CHAP applicants generally, early housing interventions are important to the program success of Opening Door participants.

### Benefits of Project-Basing Vouchers

A project based housing unit can help to quickly house all CHAP students. Such a unit offers a solution in terms of timing, stability and affordability. This eliminates the struggle of spending three months or more shopping to find a suitable unit; and also guarantees a secured unit. A project-based voucher also ensures the participants have an affordable unit throughout the duration of their education.

Project-base housing also makes it easier to incorporate supportive services into the model, especially for Opening Doors participants who will need support. THA and TCC hope to arrange these services with community-based organizations that offer supportive services (i.e., counseling, employment training) to house formerly incarcerated students will aid in the successful transition from incarceration back into the community.

There is an additional possible benefit of project-basing these vouchers. Property managers and landlords who agree to project-base vouchers for CHAP participants may also become interested in further project-basing units for all THA clients beyond the CHAP program.

### Community Consultation

THA conducted conversations with different stakeholders, including the Washington Department of Corrections, currently incarcerated students, and community corrections staff. The stakeholders confirmed the challenges that formerly incarcerated people face when attempting to secure housing after exiting the criminal justice system.

<sup>3</sup> Lebel, T. P. (2017). Housing as the Tip of the Iceberg in Successfully Navigating Prisoner Reentry. *Criminology & Public Policy*, 16(3), 891-908.



THA visited Washington Correction Center for Women (WCCW) to talk to women currently enrolled in educational programs in the facility. The intent of the visit was to gauge the needs and opinions of potential future applicants. THA created a presentation which introduced the CHAP program and also explained the differences between a tenant-based voucher and a project-based voucher. There were about 15 women in attendance and all were surveyed. In addition to the on-site visit, an additional 42 were given paper surveys to document the need/opinions of women enrolled in educational programs at WCCW. During the site visit, the women unanimously voted on the project-based model. Having immediate access to housing seemed to be the women's highest priority when they exit. Below are some notable findings from the WCCW surveys (57 total) and site visit:

| 26%   | 54%   | 25%                              | 23%  | 53%                          | 11%   |
|---|---|----------------------------------|--|------------------------------|---|
| will not have a place of residence to exit to | indicated 'housing' as one of their top five concerns | have an eviction on their record | do not have funds for application fees, deposits, etc. | will not have income at exit | will not have support from friends/family/community |

One woman talked about the opportunity and saw it as a transitional period to be used to secure immediate housing and then work towards becoming more self-sufficient, which would allow the women to then seek housing according to their preferences. Further consultation will be conducted and considered.

## Recommendation

THA and TCC staff request to the THA Board of Commissioners to authorize up to 50 College Housing Assistance Vouchers to be project based for all CHAP participants.

The initial request would have asked for project-based vouchers only for Opening Door participants; however, for two reasons the request has expanded to include all CHAP participants. The **first** is that THA and TCC are unable to determine exactly how many Opening Door participants we can expect at any given time. It would be unreasonable to hold project-based units specifically for Opening Door students while many CHAP participants lose out on this housing opportunity because they were unable to lease up successfully in the private market. The **second** is all CHAP students, not just Opening Doors participants, need the benefit of project-based housing. They are all having trouble finding housing.

If the Board approves this recommendation, THA would issue a Request for Proposal to elicit interest from potential housing and service providers.

Based on this information, staff recommend adopting resolution 2018-5-23 (5).



# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2018-05-25 (5)** **(Conversion of CHAP tenant based vouchers to project based vouchers)**

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

**WHEREAS**, THA has been providing tenant based voucher assistance to College Housing Assistance Program (CHAP) participants; and

**WHEREAS**, CHAP tenant based vouchers provides rental assistance to homeless and near-homeless TCC students, and is expanding to also serve recently incarcerated students; and

**WHEREAS**, Converting tenant-based vouchers to project based vouchers for CHAP participants would guarantee access to housing; and

**WHEREAS**, THA is committed to increasing access to housing for TCC students, including individuals with convictions histories; now, therefore, be it

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

Authorizes Tacoma Housing Authority to convert up to 50 HOP vouchers for the College Housing Assistance Program to be project based.

**Approved: May 23, 2018**

  
Janis Flauding, Chair



# **Resolution 9**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04 -27 (9)

**Date:** April 27, 2022  
**To:** THA Board of Commissioners  
**From:** April Black  
Executive Director  
**Re:** Remote Work Program

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*This resolution would authorize a new remote work program to attract and retain a talented work force, improve productivity, and job satisfaction, increase customer service, and enhance work/life balance, as well as decrease carbon emissions, parking issues, and operating costs.*

### Background and Recommendations

This resolution allows THA to implement a new Remote Work Policy. THA has consulted with both Unions and THA staff regarding the proposed policy.

Tacoma Housing Authority (THA) supports remote work as an alternative work arrangement and recognizes it to be a viable, flexible, sustainable work option when the employee, the position, and the specific work performed at any given time are suited to such an arrangement. Even with an approved Remote Work arrangement, all THA employees are expected to be able to report into a THA worksite within one-day notice, unless an approved “reasonable accommodation” is on file.

Remote work arrangements can be a temporary, provisional or a formal, recurring schedule where the employee works at a location other than their primary worksite. Either an employee or a supervisor can propose remote work as a possible work arrangement. The approval of each remote work arrangement is at the sole discretion of the Department Director and the employee’s immediate supervisor.

### Recommendation

Authorize THA’s Executive Director to adopt this new Remote Work Program policy.



# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (9) (Remote Work Program for flexibility)**

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

**WHEREAS**, During the pandemic, following state guidelines and for the safety of all employees, the agency has required employees to remote work and maintain great customer service; and

**WHEREAS**, This policy will provide a framework for establishing, evaluating and authorizing remote work arrangements where advantageous and appropriate.

**WHEREAS**, The proposed policy will positively impact THA's work culture and enhance work/life balance.

***Resolved by the Board of Commissioners of the Housing Authority of the City Of Tacoma, Washington, that:***

THA's Executive Director is authorized to adopt a new Remote Work Program.

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair



# TACOMA HOUSING AUTHORITY

|                   |                     |
|-------------------|---------------------|
| <b>Policy No.</b> | HR-25.20            |
| <b>Policy</b>     | Remote Work Program |
| <b>Date</b>       | March 25, 2022      |

## 1. Purpose

The purpose of this policy is to provide a framework for establishing, evaluating, and authorizing remote work arrangements where advantageous and appropriate. Where feasible, remote work options may help attract and retain a talented work force, improve productivity and job satisfaction, increase customer service, and enhance work/life balance, as well as decrease carbon emissions, parking issues, and operating costs.

## 2. Sources for Policy

- ▶ Collective Bargaining Agreements.
- ▶ Washington State Minimum Wage Act, Chap. 49.46 RCW.
- ▶ Fair Labor Standards Act of 1938, 29 U.S.C. § 201 *et seq.*
- ▶ THA Emergency Telework Policy.

## 3. Scope of Policy

This policy applies to all regular THA employees.

## 4. Who is Responsible for Implementing Policy

| Who  | Responsibilities  |
|--|---|
| <i>Employees</i>                           | <ul style="list-style-type: none"> <li>• Comply with this policy.</li> </ul>  |
| <i>Department Directors and Management</i> | <ul style="list-style-type: none"> <li>• In consultation with Human Resources, understand and perform any responsibilities as they pertain to the Remote Work Program and procedures.</li> <li>• Evaluate the nature of the job's essential functions and determine whether the position is eligible for telework.</li> <li>• Identify functions that may be accomplished remotely and determine whether the employee needs full access to Agency systems and/or applications, and what type of equipment they may need.</li> <li>• Ensure that employees receive and sign applicable agreement(s) including the - Alternate Schedule Application, Safety Checklist, The Remote Work Safety Checklist, IT Appropriate Use Policy and THA Confidentiality Agreement and Access Policy.</li> <li>• Ensure that the level and quality of customer service is maintained during the telework assignment, that essential job functions are accomplished, and that operational deadlines are met without increased overtime accrual.</li> </ul> |
| <i>Information Technology Manager</i>      | <ul style="list-style-type: none"> <li>• Work with departments to facilitate the procurement of the necessary technology, equipment, etc. to support any Remote Work Agreements that are approved.</li> </ul>   |
| <i>Director of Human Resources</i>         | <ul style="list-style-type: none"> <li>• Develop and maintain procedures for implementation and ongoing maintenance of the Remote Work Program policy.</li> <li>• Determine the appropriate means of communicating the policy and procedures to all employees and interested parties.</li> </ul>  |

|                                   |   |
|-----------------------------------|---|
| <i>Human Resources Department</i> | <ul style="list-style-type: none"> <li>Consult and assist Department Directors and their management teams when deciding whether a position is suitable for telework and whether to authorize an employee to work remotely.</li> <li>Provide information to employees who are interested in learning more about working remotely.</li> </ul> |
|-----------------------------------|---|

## 5. Definitions

|                                       |  |
|---------------------------------------|--|
| <i>Eligible Employee</i>              | An employee whose job tasks, essential job functions, in-person duties and responsibilities, and remote work site are suitable for a remote work arrangement as determined by the employee, his/her supervisor, and the Department Director.   |
| <i>Primary Office</i>                 | The worker's usual and customary Agency work site.   |
| <i>Remote Workspace</i>               | A work site other than the employee's usual and customary work site (Primary Office). The remote workspace may include the employee's home, another office, or other work site as approved by the supervisor and Department Director.  |
| <i>Emergency Remote Work Schedule</i> | THA has adopted remote work as a critical component of our Agency Continuity of Operations policy. Use of remote work in this capacity enables our Agency to continue functioning through hazardous weather, pandemics, physical attacks, or any other event that would result in the closure of our buildings. Emergency Remote Work conditions will be adopted for a time period called out in an Executive Action by the Executive Director, and will be governed by the Emergency Telework Policy. |
| <i>Routine Remote Work Schedule</i>   | Pre-approved as an ongoing, regular remote work schedule for an employee during the pay period. An approved routine remote work schedule allows an employee to work remotely a set, pre-determined number of days and hours each pay period.   |
| <i>Ad-hoc Remote Work Schedule</i>    | Remote Work approved for a certain occasion or fixed time-period. This schedule is not part of a previously approved, Routine Remote Schedule or an Emergency Remote schedule. Ad-hoc remote work schedules will continue to be based on hours that are conducive to good customer service and staff availability for questions, concerns, or emergency situations from landlords, tenants, or others we do business with.   |
| <i>Remote Worker</i>                  | An employee who works at a remote workspace to produce an agreed upon work product.  |
| <i>Good Standing</i>                  | Employees must be performing satisfactorily, in good standing, to be eligible for remote work. For example, employees who are on a Performance Improvement Plan, or who have received a written warning regarding poor performance or who are the subject of disciplinary or corrective action in the past six months, are not eligible for remote work.   |

## 6. Forms Associated with this Policy

|                    |   |
|--------------------|---|
| <i>THA Form HR</i> | Remote Work - Alternate Schedule Application    |
| <i>THA Form HR</i> | Remote Work - Safety Checklist                  |
| <i>THA Form HR</i> | Remote Work - Agreement                         |
| <i>THA Form AS</i> | IT Appropriate Use Policy                       |
| <i>THA Form AS</i> | THA Confidentiality Agreement and Access Policy |



## **7. Policy**

Tacoma Housing Authority (THA) supports remote work as an alternative work arrangement and recognizes it to be a viable, flexible, sustainable work option when the employee, the position, and the specific work performed at any given time are suited to such an arrangement. Even with an approved Remote Work arrangement, all THA employees are expected to be able to report into a THA worksite within one-day notice, unless an approved “reasonable accommodation” is on file.

Remote work arrangements can be a temporary, provisional or a formal, recurring schedule where the employee works at a location other than their primary worksite. Either an employee or a supervisor can propose remote work as a possible work arrangement. The approval of each remote work arrangement is at the sole discretion of the Department Director and the employee’s immediate supervisor. Tacoma Housing Authority reserves the right to revoke a remote work arrangement, and to require an employee to return to the worksite, when it is determined the remote work arrangement is no longer suited for the employee, the position or the specific work performed. If the Remote Work Agreement is ended, the employee will have two weeks to transition back to working from the primary worksite, absent exigent business circumstances.

An employee’s ability to work remotely may be based on their performance, specific work assignments and essential job functions, consistency, and in-person team relationship building and other in-person work duties. Employees must make childcare, elder care, and/or pet care arrangements during remote work as if they were working in the office. Approval for out-of- state hiring will be granted on a case-by-case basis. However, ongoing remote working out-of-state or out-of- country is not permitted.

Remote work employees must comply with all THA policies and behavioral standards. To work remotely, employees must have a signed Remote Work Agreement on file.

### **7.1 Remote Work Arrangements**

#### *7.1.1. Eligibility for an Ad-Hoc or Routine Remote Work Arrangement*

Regular, full-time employees are eligible to request an Ad-hoc or Routine remote work arrangement. Remote work is only available to employees in “good standing”. Remote working is available to represented employees per this policy and any relevant collective bargaining agreement.

Where the request is based on medical necessity as an accommodation of a disability, THA will consider such requests as part of its reasonable accommodation interactive process, including, for example, reviewing appropriate medical documentation, evaluating the position’s essential job functions, exploring options for accommodation, and discussing the matter with the employee and/or their healthcare providers. In these instances, supervisors must consult with Human Resources.

Ad-hoc remote work is for a particular purpose and for a set number of days. It is not expected to continue. In general, Ad-hoc remote workdays are permitted with the supervisor’s approval and one day notice, such as for a specific project, period of time, or inclement weather. Ad-hoc remote work arrangements of longer than twenty (20) days require the approval of the Department Director and may be subject to the requirements of a routine remote work arrangement. THA retains discretion to change or discontinue a remote work arrangement at any time.

#### *7.1.2. Application for an Ad-hoc or Routine Remote Working Arrangement*

Employees interested in considering the option to request a remote work arrangement should discuss the matter with their supervisor. When an employee routinely works away from the office, a signed Remote Work Agreement will be required.

#### 7.1.3. *Approval of Remote Work Arrangements*

| Type of Arrangement | Length                         | Written Agreement Required | Who Approves?                     |
|---------------------|--------------------------------|----------------------------|-----------------------------------|
| Emergency           | As dictated by Executive Order | Yes, asap                  | Supervisor/Department Director    |
| Ad-hoc              | 1 – 19 Days                    | No                         | Supervisor                        |
| Ad-hoc              | 20 + Days                      | Yes                        | Supervisor/Department Director    |
| Routine             | Any Length                     | Yes                        | Supervisor/Department Director/HR |

THA may determine that some positions, departments, or sites are not eligible to participate in remote work arrangements unless it involves a reasonable accommodation. Reasonable accommodation requests for remote work may not be possible if the essential functions of the position require on-site work. Routine remote work arrangements will be evaluated on a case-by-case basis. Routine remote work arrangements will continue until ended by the employee and/or the supervisor.

Disapproval or reconsideration of a request to remote work must be pre-approved by the Human Resources representative and will be explained in writing to the requestor and is not subject to appeal. In partnership with the HR department, Department Directors have discretion to decide whether to permit remote working for their department teams and will consider several factors in assessing a request for a remote work arrangement, including, but not limited to the following.

#### 7.1.4. *Organizational Basis for Remote Work*

- Consideration of the employee’s essential job functions and whether the work can be performed outside of the office on a regular basis.
- Length of time requested to remote work is reasonable from a business standpoint.
- Impact of the arrangement on the department’s workload, productivity, and morale are minimal.
- Overall ability of the department to meet objectives is not compromised as a result of the employee’s remote working arrangement.
- Employee’s likelihood of efficiently and successfully performing all job duties while remote working.

#### 7.1.5. *Job Performance History*

- Employee has demonstrated that they are able to work with minimal supervision and direction.
- Employee must be in “Good Standing” (see above Definitions).

- Employee has demonstrated proficiency with job related software and computer hardware.

7.1.6. *Accountability and Job Performance Standards*

- Current tasks, scope of work, and expected results are specific, measurable, and can be monitored by the supervisor.

7.1.7. *Communication and Client/Co-Worker Contact*

- Employee has demonstrated the ability to successfully use technology to establish effective methods of communication with supervisor, co-workers, vendors, and clients.
- The need for physical face-to-face meetings with internal/external customers and contacts is minimal.
- The employee's supervisor has the necessary time and ability to provide regular guidance and feedback with minimal face-to-face interaction.
- Equipment Needs
- The need and cost for specialized material or equipment must be minimal, and any such equipment must be easily installed for remote working use, as determined by the IT Manager.

7.1.8. *Safe Working Environment*

- Employees who are requesting remote work will be required to provide that they have a safe place to work and that there are no hazards that may cause harm. Departments may prohibit employees from printing confidential information in alternative worksites to avoid breaches of confidentiality.

## 7.2 **Work Schedule, Benefits and Compensation**

Unless otherwise approved in advance, remote working employees are expected to work and be accessible during their regular working and business hours. Remote work schedules for non-exempt employees may not begin before 6 AM or end after 6:30 PM, unless agreed upon by the employee and Department Director. Remote working employees are required to attend regular meetings, training sessions, or work at the office or other designated locations, as requested and with little notice. No overtime may be incurred without the advance approval of the employee's supervisor.

Each remote working arrangement will include hours of work within an established work week. Remote working involves a cooperative, good-faith agreement that the teleworking employee will maintain the assigned schedule and perform productive work during the designated business hours or confirmed schedule. The remote working employee must agree to minimize engaging in personal business or activities beyond the extent considered reasonable at a THA worksite. When the established hours of work and work week fall outside the typical hours/days, the IT Department will be consulted to ensure that adequate support and system availability may be provided. Just as the employee would do at a primary worksite, a non-exempt remote working employee being paid hourly must accurately record hours worked using the time-keeping method applicable to their department (including recording meal periods, sick, vacation, etc.) as required by employment status. If a remote working employee is unable to work due to illness or personal issues, that time must be reported, just as it would on a non-remote working schedule. Any overtime hours require pre-approval of the teleworking employee's supervisor.

When remote working, it is important all parties understand the expectations regarding communication, responsiveness, and availability during the employee's workday. A remote

working employee must be available during regular or core office hours by phone, email, or other specified methods of communication with their supervisor, coworkers, and others with whom job-related communication is necessary. Communication between a remote working employee and their supervisor will be in a manner and frequency appropriate for the position and individuals involved.

Within each workday, non-exempt employees are required to take rest breaks and meal periods, consistent with employment status and THA policy Working hours, HR-25.10.

Non-exempt employees must keep accurate records of their hours worked on electronic timecards which must be submitted on a bi-weekly basis. All employees must also take their regular breaks and meal periods and notify their supervisor if they will not be working during regularly scheduled work hours. Supervisors will also have to arrange Supervisor Check-ins to review work, have discussions, and ensure that the employee is maintaining productivity and customer service standards, and are taking lunch and rest periods. Overtime will only be permitted with prior Supervisor approval. Non-exempt employees who work overtime without Supervisor approval will be counseled on the need to maintain their regular schedule. Repeated overtime violations will result in the telework arrangement ending.

The employee's compensation, benefits, leave accruals, work status and work responsibilities do not change due to participation in the remote working program. Any time taken off work (annual leave, sick time, floating holidays or leaves of absence) must be arranged in advance with the employee's supervisor in accordance with THA's current policies and procedures.

Although working from home may provide some flexibility in child or dependent care, teleworking is not to be used as a substitute for such care. The focus of the arrangement must remain on job performance and meeting business needs. Employees who telework from home, except during Emergency telework, are expected to maintain appropriate child and dependent care arrangements.

Remote working employees are members of a department team and the larger THA organization. Teleworking employees must maintain the same level of coordination, communication and connectivity with their coworkers, customers, and partners as would be expected in an office environment. Becoming proficient in the tools necessary to do this in a virtual environment is essential.

### **7.3 Remote Workplace, Safety, and Injuries**

Remote working employees must designate a separate room or at least part of a room at their teleworking work site as their Remote Workspace. Unless called out in an Executive Action, THA will not reimburse the employee for any costs associated with furnishing, renovating, or constructing a home office or Remote Workspace.

Remote working employees must complete the Safety Checklist, which self-certifies that their designated workspace is safe and meets the standards set forth in the Checklist. At the employee's request, the Risk, Safety and Emergency Manager or designee is available for consultation in setting up a workstation designed for safe and comfortable work. Potential health or safety hazards at the teleworking work site may result in a delay in the approval of a remote working arrangement or the immediate suspension of an ongoing teleworking arrangement.

The employee's Remote Workspace is considered an extension of THA's workspace and therefore is covered by THA's worker's compensation insurance. Employees who work outside their designated work area and suffer an injury may not be eligible for worker's compensation insurance.

THA may be liable for job-related injuries or illnesses that occur during the employee's agreed-upon work hours when job responsibilities are fulfilled from within the designated work area only. THA assumes no liability for injuries occurring in the employee's home workspace outside agreed-upon work hours.

THA is also not liable for loss, destruction, or injury that may occur in or to the employee's home because of the employee's participation in the remote work program. This includes family members, visitors, or others that may become injured within or around the designated work area.

Employees who are injured while working in their Remote Workspace during work hours must immediately report the injury to their supervisor or Human Resources. Teleworking employees are not permitted to invite vendors, suppliers, third party contractor's, service providers, customers, residents, or other employees to their home to conduct business. Instead, such meetings must take place at THA offices, web meeting, or phone conferencing.

#### **7.4 Equipment, Hardware, Software, and Supplies**

Internet service connections are the responsibility of the employee and are an eligibility requirement. THA does not reimburse employees for any Internet service charges. Employees must secure their home Internet connection from unauthorized outside use.

Employees may choose to use their own equipment, or their THA assigned laptop, in order to perform work at home. Employees shall not be reimbursed for the use of their own equipment. All equipment used for work purposes is subject at any time to inspection and copying by THA or its designees of any records that are contained in or related to the use of such equipment to respond to Public Records Act requests, subpoenas, or other legal requirements for the production of records or information. Employees should be aware that work-related texts, voice messages, and other electronic communications on personal devices may be subject to the Public Records Act. Employees have a duty to maintain such records in accordance with the Washington Local Government Record Retention Schedules. All software used will be licensed and virus protection on employee owned computers will be functioning and up to date. THA will not provide repairs or support to employee-owned equipment. THA will determine on a case-by-case basis any specialized type of office equipment necessary for each remote working arrangement and typically will not provide any office furniture.

Employees agree to the following with regards to THA equipment used for THA business:

- Equipment shall be used for THA business only and may be inspected remotely by the THA IT Manager or designee to ensure compliance. Use of THA equipment for purposes not related to THA business may be grounds for termination of the Remote Work Agreement and/or disciplinary action.
- The employee will take reasonable precautions to protect THA-owned equipment from theft, damage or misuse and must not alter or modify any of these items without prior IT management authorization. Employees must immediately report to THA any loss or damage of such property. If the Remote Workspace is the employee's home, it is the



employee's responsibility to ensure that his or her homeowner's or rental insurance policy adequately covers equipment used for teleworking purposes.

- If repairs or support is needed, employees must return equipment to the Information Technology (IT) Department at the 902 office for repairs. Employees may work from a THA office workspace while this equipment is being repaired, or may be issued loaner equipment, at THA's option.
- Remote workers may not add any hardware or software to THA-owned computers without the express written permission of the IT Manager.
- At the termination of employment or the Remote Work Agreement, the employee must return all THA-owned equipment to IT before the employee's last day of work.

THA will supply reasonable office supplies as needed, except ink for printers.

## **7.5 Security, Confidentiality and Record Retention**

Consistent with THA's expectations of information security for employees working at the office, remote working employees are expected to ensure the protection and safeguarding of any confidential information accessible from their workspace. Employees may not disclose confidential or private files, records, materials, or information, and may not allow access to THA networks or databases to anyone who is not authorized to have access.

Security steps may include locking your computer when away, regular password maintenance, and any other measures appropriate for the job and the working environment.

The employee is responsible for the security of all confidential information consistent with THA's Information Technology Appropriate Use Policy and THA's Confidentiality Agreement. When handling particularly sensitive materials, a department may require teleworking employees to work in a location consistent with the employee's certification/s. The use of paper should be minimal, taking advantage of electronic means for storing documents. Departments may prohibit employees from printing confidential information in alternative worksites to avoid breaches of confidentiality. The IT Department will serve as a resource for paperless solutions. Documents must be disposed of in a manner appropriate with the content and consistent with THA and departmental policies.

All files, records, papers, or other materials created while remote working become THA property and must be retained (either in hard copy or electronically) consistent with the Washington State Archives CORE record retention rules and/or THA policy. All electronic documents must be saved to the THA network, and not maintained on an employee's personal computer. Each department will determine the appropriate storage method and location for documents not electronically saved.

## **7.6 Work at a THA Work Location**

There may be times when the remote working employee's physical presence is necessary at a THA office. When requested, the teleworking employee will attend job-related meetings, training sessions, etc. at the THA location designated by the supervisor. When possible, THA will provide at least one-day notice to report to a THA work location.

When a non-exempt employee is required to report to their primary worksite at the beginning of their scheduled workday, the travel time between the employee's alternative location and the primary worksite will be considered their normal commute and the time will not be compensable; similarly, if an employee ends their workday at their primary worksite, the drive

home afterward is their normal commute. When a non-exempt employee begins their scheduled workday by performing work at the alternative worksite and is then required to report to the primary worksite mid-shift, the time spent traveling between the alternative worksite and the primary worksite will be considered hours worked. If the non-exempt employee, then returns to the alternative worksite to complete their scheduled shift, the time spent traveling between the primary worksite and the telework location will be considered hours worked.

Any employee utilizing their personal vehicle for work travel during their scheduled workday is required to comply with all conditions listed in Staff Driving on THA Business policy, including but not limited to insurance coverage requirements and completion of Defensive Driver training every two (2) years. Reporting to/from their primary worksite mid-shift is considered work travel.

# **Resolution 10**



# TACOMA HOUSING AUTHORITY

## RESOLUTION 2022-04-27 (10)

**Date:** April 27, 2022  
**To:** THA Board of Commissioners  
**From:** April Black  
Executive Director  
**Re:** Emergency Mitigation Services

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*This resolution would authorize Tacoma Housing Authority's (THA) Executive Director to sign a contract with Quality Restoration d/b/a Next Level Restoration, LLC for emergency mitigation services due to fire, smoke, and water damage.*

### Background

On November 8, 2021, Tacoma Housing Authority (THA) issued a Request for Proposal (RFP) for Emergency Mitigation Services; Smoke, Fire and Water Damage for the properties managed and owned by THA.

The proposals were due on November 30, 2021. THA received three proposals. A committee was formed that included staff made up of Maintenance and Admin staff. The committee reviewed and scored each proposal received, with Quality Restoration being the preferred proposal. The outcome of the review process as follows:

|                                   | <b>Total<br/>Points Possible</b> |
|-----------------------------------|----------------------------------|
| <b>MAXIMUM SCORE</b>              | <b>420</b>                       |
| <b>FIRM NAME</b>                  |                                  |
| Belfor Group                      | 214                              |
| First OnSite Property Restoration | 90                               |
| Quality Restoration, LLC          | 404                              |

When Quality Restoration was notified that they had the winning proposal received, we were informed that they will be working under the parent name of Next Level, LLC (d/b/a of ServPro). We have received the appropriate documents, i.e., W-9 form, insurance and debarment check, that they were responsive and responsible proposal.

Due to the number of claims last year, we will be increasing the first year's contracts for THA's taxable and non-taxable properties. The first contract is with THA in the amount of \$50,000 for properties that are not charged taxes. The second, per the Procurement Policy contract will be for \$150,000 for properties that are charged taxes.

The amount is contract amount is higher than originally anticipated due to the number of claims last year. We typically use Next Level Restoration, LLC who have a d/b/a as Serve Pro for many services including for mitigation of water and fire damage in our units. We typically have insurance to cover damage from water and fire damage in our units. Our deductible is \$5000 per instance and usually most of the remaining damage is covered by insurance.

We are reimbursed by insurance after the work is completed and approved by the adjustor.

We require a contract with Next Level Restoration (d/b/a ServePro) to cover the full value of all the work they perform, including work that is reimbursed at a later date by insurance. We had a total of 12 insurance claims in 2021.

THA paid a total of \$35,000 in deductibles / portion for all claims in 2021.

2 were for fire damage = \$197,939 insurance reimbursement / \$10,000 in deductibles  
5 were for water damage = \$146,763 insurance reimbursement / \$25,000 in deductibles

We used ServPro for a portion of the fire/water mediation on these claims. ServePro is an approved vendor with our insurance carrier (Philadelphia).

### **Recommendation**

Approve Resolution 2022-04-27 (10) to authorize THA's Executive Director to execute a contract with Next Level Restoration, LLC (d/b/a ServPro) in the amount of \$150,000 for taxable properties and \$50,000 for non-taxable properties (Salishan 7 and the four Units in 1500 Hillside).





# TACOMA HOUSING AUTHORITY

## **RESOLUTION 2022-04-27 (10) (Emergency Mitigation Services)**

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

**WHEREAS**, On November 6, 2021, THA staff notified interested potential vendors and publicly advertised on (Washington Electronic Business Solutions (WEBS) for Emergency Mitigation Services: Fire, Water and Smoke Damage; and

**WHEREAS**, Three firms submitted proposals by the deadline of November 30, 2021; and

**WHEREAS**, The highest scoring responsible and responsive proposal was Quality Restoration; and

**WHEREAS**, We received documentation the business is now doing business as Next Level Restoration, LLC, (d/b/a ServPro) and we will be signing under this name; and

**WHEREAS**, There will be two contracts signed: one for the taxable properties in the amount of \$150,00 and the other for non-taxable properties (Salishan Seven and the four units at Hillside 1500 block; and

**WHEREAS**, ServePro is an approved vendor with our insurance carrier (Philadelphia); 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 execute a contract with Next Level Restoration, LLC (d/b/a as ServPro) one in the amount of \$50,000 for non-taxable properties and \$150,000 for taxable properties for a total of \$200,000.

**Approved: April 27, 2022**

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Stanley Rumbaugh, Chair