TACOMA HOUSING AUTHORITY

BOARD OF COMMISSIONERS

BOARD PACKET

September 28, 2022

Tacoma Housing Authority

Executive Director
April Black

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

REGULAR MEETING
Board of Commissioners

SEPTEMBER 28, 2022

The Board of Commissioners of the Housing Authority of the City of Tacoma will hold a Regular Meeting on **Wednesday, September 28, 2022, at 4:45 pm via Zoom and at 902 South L Street, Tacoma, WA 98405.**

https://us02web.zoom.us/j/82245634727 / Meeting ID: 822 4563 4727 / Dial: (253) 215-8782

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

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

City of Tacoma	747 Market Street, Room 800 Tacoma, WA 98402	CityClerk@cityoftacoma.com
Northwest Justice Project	715 Tacoma Avenue South Tacoma, WA 98402	
KCPQ-TV/Channel 13	1813 Westlake Avenue North Seattle, WA 98109	tips@q13fox.com
KSTW-TV/CW 11	1715 East Madison Street Seattle, WA 98122	cw11@kstwtv.com
KNKX	930 Broadway Tacoma, WA 98402	info@knkx.org
Tacoma News Tribune	2602 S. 38th Street, Suite A PMB3 Tacoma, WA 98409	newstips@thenewstribune.com
The Tacoma Weekly	2599 Pacific Highway E Fife, WA 98424	

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

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Sha Peterson
Executive Initiatives Officer

TACOMA HOUSING AUTHORITY

AGENDA
REGULAR BOARD OF COMMISSIONERS MEETING
September 28, 2022, 4:45 PM
Zoom: https://us02web.zoom.us/j/82245634727 / Meeting ID: 822 4563 4727 / Dial: (253) 215-8782

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1. CALL TO ORDER
2. ROLL CALL

3. APPROVAL OF MINUTES
- 3.1 Minutes of August 23, 2022—Special Session
- 3.2 Minutes of August 24, 2022—Annual Meeting

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. ANNUAL PLANNING
7. AGENCY MONTHLY REPORT

8. FINANCE REPORT
- 8.1 Ratifying Cash Disbursements for August 2022

9. NEW BUSINESS
- 9.1 2022-09-28 (1) Approval of THA's 2023 Moving to Work Plan
- 9.2 2022-09-28 (2) Authorize Investment Institutions and Authorized Signers

10. EXECUTIVE SESSION
- 10.1 Discussion to evaluate the qualifications of an applicant for public employment or to review the performance of a public employee.

11. COMMENTS FROM THE COMMISSIONERS
12. ADJOURNMENT

TACOMA HOUSING AUTHORITY

MINUTES

TACOMA HOUSING AUTHORITY

BOARD OF COMMISSIONERS MEETING MINUTES
SPECIAL SESSION
TUESDAY, AUGUST 23, 2022

The Commissioners of the Housing Authority of the City of Tacoma met in Special Session at 902 South L Street, Tacoma, WA 98405 and via Zoom on Tuesday, August 23, 2022, for the Board Retreat.

1. CALL TO ORDER

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

2. ROLL CALL

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

PRESENT	ABSENT
Commissioners	
Chair Stanley Rumbaugh	
Vice Chair Shennetta Smith	
Commissioner Derek Young	
Commissioner Dr. Minh-Anh Hodge	
Commissioner Pastor Michael Purter	
Staff	
April Black, Executive Director	
Sha Peterson, Executive Initiatives Officer	
Julie LaRocque, Interim Deputy Executive Director	
Jorge Perez, Finance Director	
	Jeanne Thurston, Human Resources 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 @ 4:46 pm and proceeded.

3. BOARD RETREAT

Agenda

1. Opening of Space
2. Review of Agenda
3. Check-in
4. Setting Ground Rules
5. The Objective
6. Understanding Working Assignments
7. Reflection
8. Drafting the Working Agreement
9. Voting on the Working Agreement
10. Closing of Space and Reflection

Session Objectives

The Board of Commissioners defined how the team will:

- Actualize THA values-based group and individual behavior
- Engage and support THA staff
- Intentionally build goodwill and trust with one another
- Hold itself accountable in service of the defined working agreement

Check-in

The Board of Commissioners; Leadership Team; and Diversity, Equity, Inclusion and Belonging Committee discussed what they hope to achieve during the special session of the Board and what teamwork means them and why they think it is important. They also shared what their relationship is to music.

Setting Ground Rules

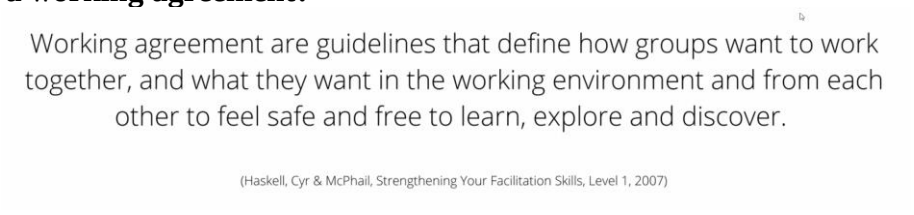
1. What are ground rules?
   - Respectful dialogue
   - Common understanding of acceptable behavior
   - Conversational guardrails
   - Agreeing
   - Order
   - Listening intently

2. Do you agree that ground rules are important for group and individual-level psychological safety?

3. How might we hold ourselves and each other accountable when we fail to observe our commitment to the ground rules?
   - Calling people in respectfully
   - Adapt your responses
   - Express how you feel

4. How should we behave when receiving constructive feedback?
   - Conduct ourselves as mature adults
   - Acknowledge feedback and ask for clarification
   - Show gratitude
   - Don't take it personally
   - Refer to ground rules

What is a working agreement?



- Positive and uplifting outcomes for all involved in THA process
- Excellence in service to community and excellence in service to staff
- Focus on how we can be best employer and housing authority

What is a working agreement?

1. What should be important to us as THA leadership?
2. What are our organizational values and core principles?
3. As a collective, are we aligned with our espoused values and core principles?
4. What behaviors should we agree to as a team?
5. How can we center equity and antic-oppressive practice in our decision-making?
6. How should the Board and staff interact?
7. How do you define accountability?

5. COMMENTS

Chair Smith thanked staff for their participation. Vice Chair Hodge added that inclusion is very important, but we must find a way to make it meaningful. Commissioner Purter suggested following up on the agreement.

6. ADJOURNMENT

There being no further business to conduct, the meeting ended at 6:41 pm.

APPROVED AS CORRECT

Adopted: September 28, 2022

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Shennetta Smith, Chair

TACOMA HOUSING AUTHORITY

BOARD OF COMMISSIONERS MEETING MINUTES
ANNUAL SESSION
WEDNESDAY, AUGUST 24, 2022

The Commissioners of the Housing Authority of the City of Tacoma met in Annual Meeting at 902 South L Street, Tacoma, WA 98405 and via Zoom at 4:45 PM on Wednesday, August 24, 2022.

Chair Rumbaugh called the meeting of the Board of Commissioners of the Housing Authority of the City of Tacoma (THA) to order at 4:50 PM.

1. ROLL CALL

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

PRESENT	ABSENT
Commissioners	
Chair Stanley Rumbaugh	
Vice Chair Shennetta Smith	
Commissioner Dr. Minh-Anh Hodge	
Commissioner Derek Young	
Commissioner Michael Purter	
Staff	
April Black, Executive Director	
Sha Peterson, Executive Initiatives Officer	
Julie LaRocque, Interim Deputy Executive Director	
Jorge Perez, Finance Director	
Jeanne Thurston, Human Resources Director	
Marquis Jenkins, Interim Property Management Director	
Sandy Burgess, Administrative Services Director	
Aley Thompson, Interim Rental Assistance Director	
Cacey Hanauer, Client Support and Empowerment Director	
Adam Ydstie, Policy, Innovation and Evaluation Director	
William Morse, Director/CIO	

Chair Rumbaugh Young declared there was a quorum present @ 4:51 pm and proceeded.

Puget Sound Regional Council (PSRC) Executive Director Josh Brown presented Tacoma Housing Authority with the VISION 2050 award and congratulated staff and commissioners for their innovation, drive, and hard work in making Arlington Youth Campus what it is today.

The VISION 2050 Awards celebrate progress to enhance the region's communities and natural environment while advancing equity and opportunity for all. The awards recognize innovative work by jurisdictions, Tribes, nonprofit organizations, businesses, and other groups in the region to create a better future for central Puget Sound.

PSRC develops policies and coordinates decisions about regional growth, transportation and economic development planning within King, Pierce, Snohomish and Kitsap counties.

Chair Rumbaugh thanked Josh for the recognition and for the effort it represents.

2. DESIGNATED EXECUTIVE DIRECTOR TO BE TEMPORARY CHAIRPERSON

Chair Rumbaugh called for a motion to designate Executive Director April Black to be temporary Chair for the nomination of Chair.

3. NOMINATION OF CHAIRPERSON

Chair Rumbaugh called for nominations for the office of Chair of the Board of Commissioners. Chair Young nominated Commissioner Smith to serve as Chair. Commissioner Hodge seconded the motion. Commissioner Smith accepted the nomination.

Upon roll call, the vote was as follows:

AYES:	5
NAYS:	None
Abstain:	None
Absent:	None

Motion approved.

4. NOMINATIONS AND VOTE FOR VICE CHAIR

Executive Director Black turned the chair over to Chair Smith. She called for nominations for the office of Vice Chair of the Board of Commissioners. Commissioner Young nominated Commissioner Hodge. Chair Smith seconded the motion. Commissioner Hodge accepted the nomination.

Upon roll call, the vote was as follows:

AYES:	5
NAYS:	None
Abstain:	None
Absent:	None

Motion approved

5. APPOINTMENT TO STANDING COMMITTEES

The Board moved for slate of appointments for the various committees below:

Real Estate Development Committee—Commissioner Rumbaugh, Commissioner Young
Finance Committee—Vice Chair Hodge, Commissioner Young
Community Partnerships and Advocacy Committee—Chair Smith, Commissioner Purter
Education, Housing, Services and Partnerships Committee—Chair Smith, Vice Chair Hodge
Diversity, Equity and Inclusion Committee—Chair Smith, Vice Chair Hodge

6. BY-LAWS REVIEW AND RECOMMENDATION

There were no changes to the By-Laws. ED Black asked The Lindsay Group to redline the current By-Laws and also asked the Diversity, Equity, Inclusion and Belonging (DEIB) staff committee to review and edit the By-Laws to present at the September Board meeting.

Dorsey and Associates reviewed the highlights of the Board Responsibilities included in the packet.

7. ANNUAL BOARD CALENDAR OF TOPICS

ED Black worked with staff on an improved board packet, highlighting topics for the month including a standing time for advocacy agenda. She is also proposing an annual predictable calendar. Chair Smith likes the calendar. Vice Chair Hodge also likes the new format and calendar which will save staff time and effort.

8. APPROVAL OF MINUTES OF THE PREVIOUS MEETING

Commissioner Smith asked for any corrections to or discussion of minutes for the Special Session of the Board of Commissioners for Friday, June 10, 2022. Commissioner Rumbaugh moved to adopt the minutes. Commissioner Young seconded.

Upon roll call, the vote was as follows:

AYES: 5
NAYS: None
Abstain: None
Absent: None

Motion approved.

Commissioner Smith asked for any corrections to or discussion of minutes for the Special Session of the Board of Commissioners for Thursday, June 30, 2022. Commissioner Rumbaugh moved to adopt the minutes. Vice Chair Hodge seconded.

Upon roll call, the vote was as follows:

AYES: 5
NAYS: None
Abstain: None
Absent: None

Motion approved.

9. COMMITTEE REPORTS

The Real Estate Development Committee met in July and discussed the purchase of North Highland Court, which was completed in July. The committee also discussed other investment opportunities and the agency's capacity as a developer. ED Black is communicating THA's plan with community partners and continues to solicit potential opportunities. THA has been serving as a development consultant for Shilo Baptist Church and helped Shilo secure funds. Beacon will be taking development of Shilo, and THA will help with additional funding needs.

The Finance Committee met last week and discussed the Brawner report. They also discussed Housing Hilltop and the recommendations for a third party. The committee discussed the 2023 budget and what increased rents are doing to clients. According to ED Black, once there is a firmer scale of how much it will cost the voucher program, THA can advocate for funding. Director Thompson added that staff are looking at trying to stabilize families and make those coming off the program more successful.

The Community Partnerships and Advocacy Committee will be meeting tomorrow; the Education, Housing, Services and Partnerships Committee is scheduled to meet on Tuesday; and the Diversity, Equity and Inclusion Committee is scheduled to meet next week.

10. FINANCE REPORT

Finance Director Jorge Perez reported the financial numbers. The THA audit will be done mostly remotely, and budgets are due in September.

11. EXECUTIVE DIRECTOR REPORT

ED Black's report includes consolidated highlights from the departments:

- Staff are attempting to use federal funding through congressional set-asides for Housing Hilltop, but this funding triggers Housing and Urban Development (HUD) requirements. The closing date may potentially move to 2023.
- The Brawner report included in the Board packet has been shared with the city council, state funders and elected officials. It will be presented to the City Council on August 30th.
- ED Black thanked the Board for their time at the retreat, which she felt was a productive conversation. She is putting together working agreements to present to the DEIB Committee and then to the Board.
- For the September Board meeting, the board will review the Moving to Work (MTW) plan including feedback from staff and the community.
- ED Black updated her Board report to include advocacy priorities for the Board each month. Commissioner Young asked for a column for specific ask of the Board.

12. COMMENTS FROM COMMISSIONERS

Commissioners agreed that Chair Smith did a great job on her first meeting as Board Chair. Commissioner Purter thanked THA staff especially Nick Tolley, Sherri Tift, Mike Cox, and Mike Foley, as well as the property managers for their beautiful virtual tour of THA properties. Commissioner Rumbaugh agreed that they are terrific. Vice Chair Hodge thanked Commissioner Purter and Chair Smith who recommended the virtual tours. Chair Smith thanked ED Black for her packet and staff for the work they do. Commissioner Young appreciates the report changes and THA trying to evolve. It is so much easier to get through and digest, he stated.

13. ADJOURNMENT

There being no further business to conduct at the Board of Commissioners Annual Meeting, Chair Smith moved to adjourn. All votes were in favor of adjournment.

The Board of Commissioners Annual Reorganization meeting adjourned at 6:19 pm.

APPROVED AS CORRECT

Adopted: September 28, 2022

_____

Shennetta Smith, Chair

Real Estate Development Committee
Commissioner Stanley Rumbaugh
Commissioner Derek Young
April Black
Sandy Burgess
Richard Deitz
Julie LaRocque

Finance Committee
Commissioner Derek Young
Vice Chair Minh-Anh Hodge
April Black
Richard Deitz
Duane Strom
Julie LaRocque

Community Partnerships and Advocacy Committee
Chair Shennetta Smith
Commissioner Pastor Michael Purter
April Black
Nick Tolley
Marquis Jenkins
Julie LaRocque

Education, Housing, Services and Partnerships Committee
Chair Shennetta Smith
Vice Chair Minh-Anh Hodge
April Black
Katie Escudero
Jess Thompson
Aley Thompson
Julie LaRocque

Diversity, Equity and Inclusion Committee
Chair Shennetta Smith
Vice Chair Minh-Anh Hodge
Cacey Hanauer
Sharrall Madden
Marquis Jenkins
Katie Escudero
Jess Thompson
Aley Thompson
Julie LaRocque

TACOMA HOUSING AUTHORITY

ANNUAL PLANNING

TACOMA HOUSING AUTHORITY GOALS

LONG-TERM GOALS & OBJECTIVES

In addition to our mission to provide high-quality housing and supportive services to people with low incomes, with a focus on those facing the greatest marginalization. As we look toward the next several years, we will set goals, metrics, and strategies to support the four goals:

INCREASE THE AMOUNT OF AVAILABLE HOUSING FOR LOW-INCOME FAMILIES

In the next 5 years:

- Add at least 500 new units of affordable housing through development or partnerships.
- Purchase at least 200 housing units that can be prioritized for voucher holders.
- Rehabilitate and or refinance at least 100 units of existing housing to improve quality of life for tenants and long-term viability of the property.

In the next year, develop a process or program for THA customers to purchase homes.

INCREASE HOUSING ACCESS & STABILITY

- Maintain a 98% occupancy rate or higher in THA's portfolio.
- Maintain THA's MTW requirement to serve substantially the same number of customers.
- In the next year, decrease the number of households on THA programs paying more than 40% of their income for housing.
- In the next 2 years, increase the percent of households able to secure housing with a voucher from 55% to 60%.
- Within 3 years, develop a strategy for measuring customer (housing recipients, landlords, vendors, etc.) satisfaction and publish baseline data.

EMBED PRINCIPLES OF DIVERSITY, EQUITY, INCLUSION & BELONGING (DEIB) IN THA'S PROGRAMS, CULTURE & PRIORITIES

- In the next year, in an effort to increase accessibility and ease of doing business with THA, increase the number and percentage of THA invoices paid within 30 days from the date of invoice and work to reduce the barriers to disadvantaged business enterprises.
- In the next year, review where and how to set goals related to the use of Universal Design.
- In the next 2 years, increase the percentage (by number and dollars) of minority and women-owned businesses receiving contracts or direct purchase requisitions with THA and/or on projects paid for with THA funds.
- In the next 3 years, review THA policies and practices related to housing, procurement, and employment and revise them to make them more equitable.

MAKE THA A GREAT PLACE TO WORK

- In the next year, increase THA retention from 79% to 85%.
- In the next year, increase the number and hours worked of THA residents and low-income Tacomans hired into THA jobs and THA-funded work.
- In the next year, increase the number and percentage of THA staff earning a housing wage.
- Within two years, develop a strategy for measuring staff satisfaction and publish baseline data.

September 28, 2022

SHORT-TERM GOALS & OBJECTIVES

In 2023, THA will continue to respond to the community's needs while leveraging MTW flexibility to:

INCREASE THE AMOUNT OF AVAILABLE HOUSING FOR LOW-INCOME FAMILIES

We will focus efforts on projects that are financially feasible and/or can be accomplished with partners.

THA will focus on acquiring housing units to add to THA's portfolio.

THA will explore ways it can use MTW flexibility to make homeownership options available to its customers.

INCREASE HOUSING ACCESS & STABILITY

Transitioning HOP households to the traditional HCV voucher helps deepen affordability for households whose rents would have been unaffordable if their incomes decreased.

THA has established a regular schedule for analysis to ensure THA's payment standards are keeping pace with the market, enabling households to secure housing.

THA is aligning with existing systems of care, housing, and education partners to have a larger impact among THA residents and those most likely to face a housing crisis.

THA will continue the redesign of the Family Self-Sufficiency (FSS) program and continue to support families with children in middle school and/or high school through the recently implemented Two Generational Program (2Gen).

THA is creating a comprehensive data system that connects the organization and better manages data, enabling us to make data-driven decisions and continually improve operations and programs.

EMBED PRINCIPLES OF DIVERSITY, EQUITY, INCLUSION & BELONGING (DEIB) IN THA'S PROGRAMS, CULTURE & PRIORITIES

THA will begin collecting data on the number of disadvantaged business enterprise, including minority and women-owned businesses, Section 3 businesses, and veterans-owned businesses receiving contracts with THA and/or on projects paid for with THA funds. We will also try to attract more of those businesses.

THA will review THA policies and practices related to housing programs and services, procurement, and employment; revise them to make them more equitable; and establish a consistent review cycle thereafter.

THA will raise awareness and increase understanding of the foundational definitions and principles of diversity, equity, inclusion, and belonging for THA staff, leadership, and Board of Commissioners realize better communication and provision of housing and support services.

THA will develop an inclusive governance and collaboration structure to establish and move forward THA's strategies and priorities; establish regular review cycles to ensure THA's decision-making structures are audited through a DEIB lens.

MAKE THA A GREAT PLACE TO WORK

THA will focus on equitable hiring, improving retention and increasing the number of customers and low-income Tacoma residents hired by THA and its partners.

There will be a greater percentage of THA staff being paid housing wage—the hourly wage needed to afford a two-bedroom unit in Tacoma. As of the writing of this report, a 2-bedroom apartment in Tacoma required a full-time wage of $32 per hour.

TACOMA HOUSING AUTHORITY

AGENCY MONTHLY REPORT

TACOMA HOUSING AUTHORITY

To: THA Board of Commissioners
From: April Black, Executive Director
Date: September 28, 2022
Re: Agency Monthly Report

THA's Mission

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

On the following pages you will find our agency highlights for the month of September. The agency updates are categorized as they relate to our long-term goals:

- Increase the amount of available housing for low-income families
- Increase housing access and stability
- Embed principles of diversity, equity, inclusion and belonging (DEIB) in THA's program, culture, and priorities
- Make THA a great place to work

Every person at THA contributes to our work and is integral to fulfilling our mission. This report represents just a small percentage of the work our team does in service to our community.

TABLE OF CONTENTS

Increase the Amount of Affordable Housing for Low Income Families 2

Increase Housing Access and Stability 4

Embed Principles of Diversity, Equity, Inclusion, and Belonging (DEIB) in THA's Programs, Culture, and Priorities..... 6

Make THA a Great Place to Work..... 6

Follow up from August Board Meeting..... 7

A Look Ahead: October Board Focus 8

Advocacy Items 8

Action Items..... 9

INCREASE THE AMOUNT OF AFFORDABLE HOUSING FOR LOW INCOME FAMILIES

HOUSING HILLTOP (231 UNITS)

Housing Hilltop is THA's next development project. It will include 231 units of affordable housing and 13,000 square feet of commercial space prioritized for local BIPOC businesses. The property is along S L Street between S 10th and Earnest S Brazill St.

FUNDING UPDATES

The staff director of the Congressional Transportation, Housing and Urban Development Committee has approved our request to use the congressionally directed funding for Housing Hilltop specifically for tenant improvements in the commercial spaces. We are now working with HUD to amend the award such that these funds will not trigger the NEPA requirements the project cannot meet.

We have had conversations with individual County Council members and the Human Services Committee of the County Council. In the meetings, we discussed County funds that had been committed to Hillside 1500. As we have discussed with the board, we cannot move forward with redevelopment of Hillside 1500 until after we complete Housing Hilltop. The commitment of funds from the County will expire by that time, and the Council may pursue reallocating these funds to Housing Hilltop.

POSSIBLE RISKS

The Environmental Phase I for the north building site for Housing Hilltop revealed the historic presence of a laundry business on the Alberta J. Canada parking lot on the northeast corner of 11th and L Streets. We are conducting an additional assessment to determine if there is an underground storage tank and/or contaminated soil. We anticipate having this information in the next few weeks.

UPDATE ON CLOSING DATE

We are still anticipating closing and construction start by the end of 2022.

POSSIBLE ACQUISTION

Staff continue to analyze the feasibility of an acquisition of 37 units in Midland, just outside the Tacoma city limits. We are exploring Housing Trust Funds, bank financing, and a private investment to purchase the property. More details to come.

INFORM LOCAL OFFICIALS AND COMMUNITY ABOUT OUR PLANS

This month we presented to the Tacoma City Council, Pierce County Council Human Services Committee, and Tacoma Pierce County Affordable Housing Coalition about THA's work and plans to add more affordable housing.

Here is the link to the August 30th Tacoma City Council Study Session presentation: https://cityoftacoma.granicus.com/player/clip/5592?view_id=4&redirect=true&h=f5b788899f6e64995ed7bff34f15340e

Here is the link to the Pierce County Human Services Committee packet and video (meeting September 20, 2022): https://www.piercecountywa.gov/5179/Human-Services-Committee

INCREASE HOUSING ACCESS AND STABILITY

UNDERSTANDING WHO WE SERVE

Last month, the Board was provided with a preview of a report summarizing some key data points about who we serve. The full report has been completed and is attached to this month's report. The Resident Characteristics Report is a new endeavor for the PIE Department and the staff intend to make this an annual effort, ensuring staff and leadership know about who we serve, identify disparities, and drive strategy to close those gaps in a data-informed way.

RESOLVE TENANT DEBTS IN THA'S PORTFOLIO

We are still working to resolve tenant debts in THA's portfolio. We are working with a local funder to see if there are options to help with this. If not, you will see a resolution to use THA funds in October.

LOTS OF SUMMER LUNCHES AND BACKPACKS DISTRIBUTED IN THE PORTFOLIO

This Summer CSE helped facilitate 3,585 total lunch deliveries for kids, we gave out 1,715 in August alone.

The 2Gen team, Maintenance, and Property Management held a Back-to-School event at Bay Terrace where they gave away more than 100 backpacks, had a resource fair and a DJ, provided food and solicited community feedback about what to do with the newly vacated community space!

SHARED SERVICES CHILDCARE EFFORTS

Staff met with Sen. Murray's office to talk about Shared Services and Childcare efforts. Foundation for Tacoma Students (FFTS) is leading a collaborative partnership that includes THA, First 5 Fundamentals, Child Care Resources and others. We hope for federal funding to support this work.

UPGRADED COMMUNITY ROOM AT BERGERSON TERRACE

Trish Mozo, Martha Matthias, Marquis Jenkins and Regina Rios hosted the grand opening of Bergerson Terrace's newly redone Community Room! It was a well-attended event where folks were welcomed to the new space with food, art activities, cake, games and a resource fair. The new room looks amazing!

NEW SMOKE FREE SIGNS AT THA PROPERTIES

Tacoma-Pierce County Health Department gave the properties over 20 sandwich board promoting a smoke free environment and these will be placed in the midrise common areas.

RENTAL ASSISTANCE PROGRAM HIGHLIGHTS

Utilization:

- Overall agency utilization is 98%. We will begin to issue vouchers to account for attrition and to boost utilization. We will also absorb all Port-ins by the end of the year.
- Emergency Housing Voucher (EHV) utilization has reached 41%, which is slightly below the national average. Family Utilization Program (FUP) utilization is over 90% and we've identified FUP waitlist households eligible for EHVs. Foster Youth to Independence (FYI) voucher utilization is coming along at 7%

Housing Success:

- 55% is the housing success rate for people searching for housing with vouchers. HUD released the 2023 Fair Market Rents (FMR) and the increases were over 10% nationally and around 11% in our jurisdiction. Rental Assistance is working with Policy, Improvement, and Evaluation (PIE) to develop recommendations about our Payment Standards to increase the value of a voucher and improve THA's housing success rate. These recommendations will be presented at the October Board meeting.
- 86 days is the average length of time it takes prospective residents to find housing

Clients Served Last Month (August):

- 39 new admissions were housed (voucher programs)
- 311 recertifications & relocations were completed
- 433 Inspections were completed
- 750 Customers visited 902 S L St.

Trends to highlight:

- 21% ($185) is the average rent increase in August
- $1,473 is the average contract rent for units leased with THA rental subsidy in the past year

EMBED PRINCIPLES OF DIVERSITY, EQUITY, INCLUSION, AND BELONGING (DEIB) IN THA'S PROGRAMS, CULTURE, AND PRIORITIES

EXPANDING JOB OPPORTUNITIES FOR CUSTOMERS

Multiple departments started collaborating about a THA position to support resident hiring and working together to develop a strategy for increasing our employment support for residents. This team meets weekly and is hoping to have a finalized job description within a couple of weeks

COMMUNITY OUTREACH

Staff began meeting with the Hilltop Action Coalition to finalize a new contract and build some new relationships to support the community development work being done with Hilltop residents. About 20 THA staff also attended the Hilltop Street Fair to share information about THA's programs and hear from the local community.

MAKE THA A GREAT PLACE TO WORK

PROVIDE STAFF WITH THE TOOLS THEY NEED TO DO THEIR JOBS

THA began the first comprehensive training with Yardi this past month. For the first time, team members in a variety of different areas were able to train within the Yardi system using actual THA data. This was made possible because of the first large-scale data conversion THA completed since the last report.

These first training sessions are just the start. Training, configuration, and data migration will continue until the project's scheduled go-live in September or October of 2023.

BEGIN LOOKING AT EMPLOYEE DATA TO INFORM FUTURE STRATEGIES

You will find two attachments to this report. One is a summary of staff retention data. You will see our turnover data is similar to local trends. We are still focused on reducing staff turnover and making THA a place where people want to work, grow, and retire.

The second data summary relates to staff demographic information as they compare to the customers THA serves.

FOLLOW UP FROM AUGUST BOARD MEETING

WORKING AGREEMENTS

The THA Board, Staff DEIB Steering Committee and THA Leadership team met on August 23rd to participate in a retreat. Attached are the materials used by our facilitator, Dr. Preston Lindsay.

The retreat was a good opportunity to connect with each other and to have staff interact directly with the Board. To create working agreements, we were asked several questions. After the 2nd hour of the retreat, it was clear we need more training, and all staff need to be included in more decision making about engaging equity and anti-oppressive practices.

After further discussion with the Board DEIB Subcommittee and staff DEIB Steering Committee, we are going to continue to focus our efforts on bringing in training for all staff. Bringing in that training is taking a little longer than expected because we are trying to be clear about what we are looking for, use equitable and accessible procurement practices, and get this right. It is likely we will not be offering the first training until late fall.

BYLAWS

As a follow up to the August Board meeting, I asked The Lindsay Group for specific policy recommendations about THA's Board Bylaws. We shared those recommendations with staff and Commissioners on September 14th. I am recommending the Board and Staff DEIB Committee review the information from The Lindsay Group and make recommendations to the full Board in October.

A LOOK AHEAD: OCTOBER BOARD FOCUS

Our October Board meeting will be focused on an analysis of the rental market, considering changes to the payment standards, reviewing how changes impact THA's budget, and setting voucher leasing goals that will be incorporated into the upcoming budget.

ADVOCACY ITEMS

We currently have five advocacy priorities.

1: ARLINGTON SERVICES FUNDING

Arlington Drive is an ambitious housing program supporting young people with high needs. To ensure they get the support they need to thrive, intensive round-the-clock services are an integral part of program operations. In the previous biennium, Arlington Drive received $4.25M from the state via a proviso to fund the services. Staff are working closely with The Department of Commerce, our partners, and local funders to secure ongoing service funding and will be hard at work throughout the legislative session advocating for continued funding.

We have created a one-page document describing the successes of the project to-date. It is attached to this report.

2: FEDERAL DELEGATION

Congress is in the process of creating and passing the FY 23 Federal Budget. This is our primary source of income. While the current versions of the budget show an increase to our programs, the income increases are outpaced by market rent increases and inflation. We need to advocate for more funding for existing programs and customers -therefore we will be working diligently to communicate to our Congressional delegation that a robust **increase to vouchers** is necessary to counter the rent increases and inflation, especially considering HUD's increases to FMR standards.

There is also a growing number of people in need of housing. Housing should be a human right. We will be advocating for an **expansion of federal tax credits supporting the LIHTC** program, to increase the amount of housing that serves sub-30% AMI with supportive services that can be built in our State, and in Pierce County/Tacoma.

Finally, we will work with our delegation on modifying the federal rule that disallows using our federal dollars to pay for **tenant debt forgiveness**. Providing more flexibility in this matter will allow us to serve our customers more equitably while maintaining fiscal responsibility more equitably.

3: SHARED SERVICES CHILD CARE FUNDING

Foundation for Tacoma Students (FFTS) submitted a request for Congressionally directed spending for our partnered project to increase childcare access (Shared Services Childcare Efforts, page 5). Senator Patty Murray has gotten the request into the Senate budget. We need to advocate keeping it in the final budget request.

4: ACQUISITION FUNDS

THA's voucher holders continue to be challenged with finding available housing. Only about 50% of the households with subsidies that are looking for housing successfully find housing. This means people could afford to pay their rent if only there was housing for them to rent. THA is attempting to impact this challenge by purchasing housing that could immediately be rented to voucher holders. We bought North Highland Court in 2022. More acquisition funding from local, state, or federal sources could help us buy more housing to rent to extremely low-income renters. We will be advocating with local partners to expand and make more flexible the State's Rapid Capital Acquisition (RCA) program so that we can quickly take advantage of land/development sales when they come on the market.

We will also be working with local partners to ensure that Pierce County/Tacoma has more projects proposed in for direct appropriation as we advocate for State spending in our region.

5: ADU-DADU AFFORDABILITY INCENTIVES

THA will work with City and State partners to help design affordability incentives for homeowners who wish to build Accessory Dwelling Units (ADU's) or Detached Accessory Dwelling Units (DADU's) on their properties. These affordability incentives could include housing a voucher holder for a designated period in return for favorable loans, simple design and permitting, or other benefits. ADU-DADU construction has the potential to support our housing supply needs or have a negative impact on local affordability, depending on how we approach it.

ACTION ITEMS

We currently have three action items.

1: AVIVA CROSSING INFRASTRUCTURE

THA will be working with the City of Tacoma on a 2023 Capital appropriation request to fund a significant portion of the infrastructure work required to move forward with the Aviva Crossing development in the coming years.

2: HILLSIDE 1500 REALLOCATION

THA is working with Pierce County to approve a reallocation of the funding awarded to Hillside 1500 ($1.1M) to the Housing Hilltop project considering the difficulties presented by the Congressionally directed funding.

3: ADDRESSING THE DIGITAL DIVIDE -THA PILOT PROJECT

THA has engaged TPU and community partners to begin crafting a pilot project that utilizes the City-owned fiber backbone to install equitable ethernet and Wi-Fi access at THA properties. We are hoping to have a pilot project designed and put in place in the coming year that supports budgeting and build-out of all THA's portfolio in due time.

2021 RESIDENT CHARACTERISTICS ANALYSIS

Prepared by Daniel Stutman, Data Analyst | Policy, Innovation, and Evaluation

September 2022

Introduction

The Resident Characteristics Analysis is a new endeavor for Tacoma Housing Authority (THA), with the goal of describing some of the key characteristics of the people THA serves to a wide variety of audiences. It was developed with THA strategy, stakeholder interests, and the broader community in mind. It spans a variety of topics and comparisons to describe the populations that THA serves, primarily at the household level and in the timeline of an entire calendar year. The major population of interest are the households served in one of three main THA programs at any time during the 2021 calendar year. In some instances, comparisons are made across years from 2019-2021 to monitor trends and/or differential impacts. The programs used for comparison are:

- **Tenant Based Vouchers (TBV)**: households residing in apartments owned by private landlords
- **THA Properties**: households residing in properties owned and managed by Tacoma Housing Authority
- **3rd Party Project-based Vouchers (PBV)**: households residing in properties owned and managed by 3rd party organizations

It should be noted that program participants in THA's local, non-traditional programs (i.e., Property-based Subsidy program, Rapid Rehousing, etc.) are tracked by partners and maintained outside of THA's administrative data system, therefore they are not represented in this analysis. Similarly, households who ported out to another jurisdiction are also excluded.

Key Findings

Households Served

- Total households served in 2021 returned to 2019 levels at approximately 4,900 households
- Tenant Based Voucher Households remained the majority of households served (60%) but were slightly decreasing year-over-year as a percentage of the total households served while Project Based Voucher Households were slightly increasing in proportion

Household Demographics

- A higher percentage of households served in 2021 self-identified as BIPOC (49%) compared with White (not Hispanic or Latino) (34%)
- Racial/Ethnic representation Black, Indigenous, and People of Color (BIPOC), White (not Hispanic or Latino), and unknown race/ethnicity varied by program category
- Some Race/Ethnic groups were more highly represented in 2021 households served than others when comparing to Tacoma Families in Poverty Census data
- The majority of households served were female-headed households (74%)
- In 2021, 45% of all households served were disabled and 30% were elderly (62+)
- Female head of households tended to be younger than males, median 49 and 59 years old, respectively
- In 2021, 51% were single-person households, and nearly 70% were single or 2-person households.

Income

- In recent years, Tacoma Family Area Median Income (AMI) has increased while THA Household relative income (%AMI) has decreased
- In 2021, 3rd Party PBV Program households had the highest proportion of Extremely Low-Income Households, 92%
- In recent years, a greater proportion of the total households served were in the bottom 2/3s of the Extremely Low-Income category

- Household income, represented as a percentage of Tacoma AMI (controlling for year and household size), varied by year of service, Program, household size, head of household gender, self-reported race and ethnicity, Zip code, and other demographics

Location

- Nearly 50% of all 2021 households served resided in 3 Zip Codes: 98404, 98405, and 98409
- Households served in the Tenant Based Voucher program in 2021 appeared to vary in geographic distribution when comparing White (not Hispanic or Latino) households with BIPOC households, most notably with greater concentration of BIPOC households to the southeast regions of Tacoma

Exits

- In 2021, program exit turnover returned to near 2019 levels following a decrease in 2020
- Program exit turnover was highest in the 3rd Party PBV program (12%), lowest in the THA Portfolio Program (5%)

Table 1. Selected Characteristics of Households Served in 2021, by Program

A subset of characteristics is presented by program category and combined in the final column. A total of 4,854 households were served in 2021.[1] Statistics used may vary slightly by measure and are described with the use of parenthesis. For instance, the Number of Children Served in the Household Counts Section is paired with a percentage for each Program representing the proportion of the total number found in the Combined column (which adds to 100%). However, the Number of Households with Children measure in the Selected Household Demographics section is presented as a percentage of the total Number of Households Served per Program found in the Household Counts section.

Measure	Tenant-Based Vouchers	THA Portfolio	3rd Party PBV	Combined
Household Counts				
No. (% of Combined Total) of Households Served	2,849 (58.7%)	1,432 (29.5%)	573 (11.8%)	**4,854 (100%)**
No. (% of Combined Total) of Individuals Served	6,117 (58.3%)	3,451 (32.9%)	916 (8.7%)	**10,484 (100%)**
No. (% of Combined Total) Children Served	2,161 (56.2%)	1,418 (36.9%)	265 (6.9%)	**3,844 (100%)**
Household Income				
Median Gross Household Income	$12,976	$12,318	$9,876	**$12,192**
Median Gross Household % AMI	18.3%	17.3%	15.3%	**17.5%**
Household Size				
Median Household Size	1	2	1	**1**
Average Household Size	2.1	2.4	1.6	**2.2**
Selected Household Demographics				
Median Age of Head of Household	53	48	58	**53**
No. (%) Households with Children	987 (34.6%)	606 (42.3%)	125 (21.8%)	**1,718 (35.4%)**
No. (%) Elderly Households	860 (30.2%)	384 (26.8%)	223 (38.9%)	**1,467 (30.2%)**
No. (%) Disabled Households	1,402 (49.2%)	480 (33.5%)	282 (49.2%)	**2,164 (44.6%)**

[1] Excluding Property-Based Subsidy, Local Non-Traditional Households, Port Outs, and the Homeownership Program. The Homeownership Program data was excluded such that the included 3 Program populations add to 100% of the Combined group. This also applies wherever comparisons are made between the 3 Programs in other sections of this analysis.

No. (%) Work-able Households	1,144 (40.2%)	763 (53.3%)	182 (31.8%)	**2,089 (43.0%)**
No. (%) BIPOC Households	1,349 (47.3%)	844 (58.9%)	183 (31.9%)	**2,376 (48.9%)**
No. (%) White (not Hispanic or Latino) Households	1,022 (35.9%)	404 (28.2%)	223 (38.9%)	**1,649 (34.0%)**

Methods

This analysis incorporates a new approach to describing household income, by extending the routine focus from average household gross income alone to include household gross income as a percentage of Tacoma's Area Median Income (AMI), which varies by year and the number of people in a household. AMI is a measure based upon the median income statistic, which is equal to the 50th percentile income in a population distribution. It is the mid-way point between the lowest and highest income. It tends to be less sensitive to extremely high incomes which could throw off an average and lose its representative quality to some degree. This innovation enables an improved way to compare household finances while controlling for factors like year (while the region is experiencing rapid inflation) and household size. For instance, the relative value of a particular gross household income will lead to different % AMI if the household has 1 or 5 members, and/or has the same income in 2019 and 2021 (Table 2 and Figure A).

Many of the components in this analysis depict variation in households served by Program, ZIP code, and upon multiple demographics: age, gender, race/ethnicity, elderly/disability status, household size, number of adults, and number of children. A race/ethnic comparison of THA households served relative to the proportion of Tacoma families in poverty from a U.S. Census data source is also presented. In the latter sections (and Appendix), the analysis takes a more in-depth look into household income comparisons including median AMI, AMI distributions, and a low-income bucketing system facilitated by the AMI shift described above. The low-income bucketing system relates to AMI:

- **Extremely Low Income**: 0 to 30% (exclusive) AMI
- **Very Low Income**: 30% (inclusive) to 50% (exclusive) AMI
- **Low Income**: 50% (inclusive) to 80% (exclusive) AMI

The findings in this analysis are designed to inform diverse audiences about some of the key characteristics of the households THA serves and does not claim to represent every important aspect of the population THA serves. This work may then serve as a reference document for subsequent inquiries for interested parties.

Table 2. THA Household Income Compared with Tacoma Area Median Income, 2019-2021

The households THA serves have decreasing income levels relative to the overall Tacoma population. While the Tacoma Area Median Income increased from 2019 to 2021, THA household AMI decreased. 2022 data indicates the largest year-year increase in Tacoma AMI of 11.7%. *Tacoma AMI Source: Multifamily Tax Subsidy Income Limits, Office of Policy Development and Research* | U.S. *Department of Housing and Urban Development*. https://www.huduser.gov/portal/datasets/mtsp.html.

Measure	Year							
	2019		2020		2021		*2022*	
Tacoma Area Median Income ($, %change)	$80,200		$87,300	8.9%	$91,100	4.4%	*$101,800*	***11.7%***
THA Average Household Income ($, %change)	$16,821		$17,088	1.6%	$17,344	1.5%		
THA Median Household Income ($, %change)	$12,210		$12,410	1.6%	$12,192	-1.8%		
THA Median Household %AMI (%, %change)	19.6%		18.5%	-1.1%	17.5%	-1.0%		

Limitations

Several limitations occur in this analysis due to the quality of real-time and accurate income information. Household income certification may occur upon different yearly scheduled intervals (yearly, biannual, triannual), such that data lag may occur. However, these limitations are spread throughout the household population and may be equalized to some degree. Likewise, unreported head of household race and ethnicity may reduce the power of some demographic comparisons and may be opportunities for improved data collection.

Table of Contents

Introduction **1**

Key Findings **1**

Table 1. Selected Characteristics of Households Served in 2021, by Program 2

Methods **3**

Table 2. THA Household Income Compared with Tacoma Area Median Income, 2019-2021 3

Limitations **4**

1. Households Served **7**

Figure 1. Total Households Served, 2019-2021 7

Figure 2. 2021 Households Served by Program 7

Figure 3. Proportion of Total Households Served by Program, 2019-2021 8

Figure 4. Overall Program Entries and Exits, 2019-2021 8

Figure 5. Entries and Exits by Program, 2019-2021 9

2. Geographic Distribution of Households Served **10**

Figure 6. 2021 Households Served by ZIP Code 10

Figure 7. 2021 Households Served by ZIP Code and Program 11

3. Race and Ethnicity of THA Head of Households Served **12**

Figure 8. 2021 Overall Households Served by BIPOC, White, Unknown 12

Figure 9. 2021 Households Served by Head of Household Race/Ethnicity 12

Figure 10. 2021 Households Served by BIPOC, White, Unknown and Program 13

Figure 11. 2021 Tenant Based Voucher Geographic Distribution, BIPOC and White 13

4. Comparing Race/Ethnicity of THA Households with Census Data **14**

Figure 12. Families in Tacoma by Race/Ethnicity 14

Figure 13. 2020 Family Poverty Rates in Tacoma, by Race/Ethnicity 14

Figure 14. Proportion of THA Households Served Compared with Tacoma Families in Poverty, by Race/Ethnicity 15

5. Gender of Head of Household **16**

Figure 15. 2021 Households Served by Head of Household Gender 16

Figure 16. 2021 Households Served by Head of Household Gender and Program 16

6. Elderly and Disability Status of Household **17**

Figure 17. 2021 Households Served by Household Elderly and Disability Status 17

Figure 18. 2021 Households Served by Household Elderly, Disability Status, and Program 18

7. Age of Head of Household **19**

Figure 19. 2021 Households Served by Age of Head of Household 19

Figure 20. 2021 Households Served by Age and Gender of Head of Household 19

8. Household Size **20**

Figure 21. 2021 Households Served by Household Size 20
Figure 22. Overall Distribution of Households Served by Household Size and Program, 2021 20
Figure 23. Program-Specific Distribution of Households Served by Household Size and Program, 2021 21
9. Household Income Comparisons 22
Figure 24. 2021 Low-Income Distribution by Program 22
Figure 25. Household %AMI Distribution Trend, 2019-2021 23
Figure 26. Median %AMI by Household Size and Program, 2021 24
Figure 27. Median Household %AMI by Household Size and Head of Household Gender, 2021 25
Figure 28. Median %AMI by Household Size and Head of Household Race/Ethnicity, 2021 26
Figure 29. 2021 Low-Income Distribution by Household Size 27
Figure 30. 2021 %AMI Distribution by Gender of Head of Household 28
Figure 31. 2021 Low-Income Distribution by Race/Ethnicity of Head of Household 29
Figure 32. 2021 Low-Income Distribution by Race of Head of Household 30
Figure 33. 2021 Low-Income Distribution by Household Disability Status 31
Figure 34. 2021 Low-Income Distribution by Household Elderly Status 31
10. Median %AMI by ZIP Code 32
Figure 35. 2021 Tenant Based Voucher Median %AMI by ZIP Code 32
11. Appendix 33
Figure A1. Area Median Income in Tacoma, 2019-2021 33
Figure A2. %AMI Distribution by Program and Yearly Trend, 2019-2021 34
Figure A3. Median %AMI by Household Size and Program, 2019-2021 35
Figure A4. Median Household %AMI by Household Size and Head of Household Gender, 2019-2021 36
Figure A6. 2021 %AMI Distribution by Household Size and Number of Adults in Household (1 vs 2+) 38
Figure A7. 2021 %AMI by Number of Children, Head of Household Gender, and Number of Adults 39
Figure A8. 2021 Tenant Based Voucher Median %AMI by ZIP Code, Number of Adults, and Race/Ethnicity 40

1. Households Served

Figure 1. Total Households Served, 2019-2021

A total of 4,881 households were served in 2021 irrespective of duration in program, which was a 2.3% increase from 2020. In 2020, the number of households served decreased 3.9% from the previous year possibly influenced by Washington State's Eviction Moratorium which ended June 30, 2021.[2]

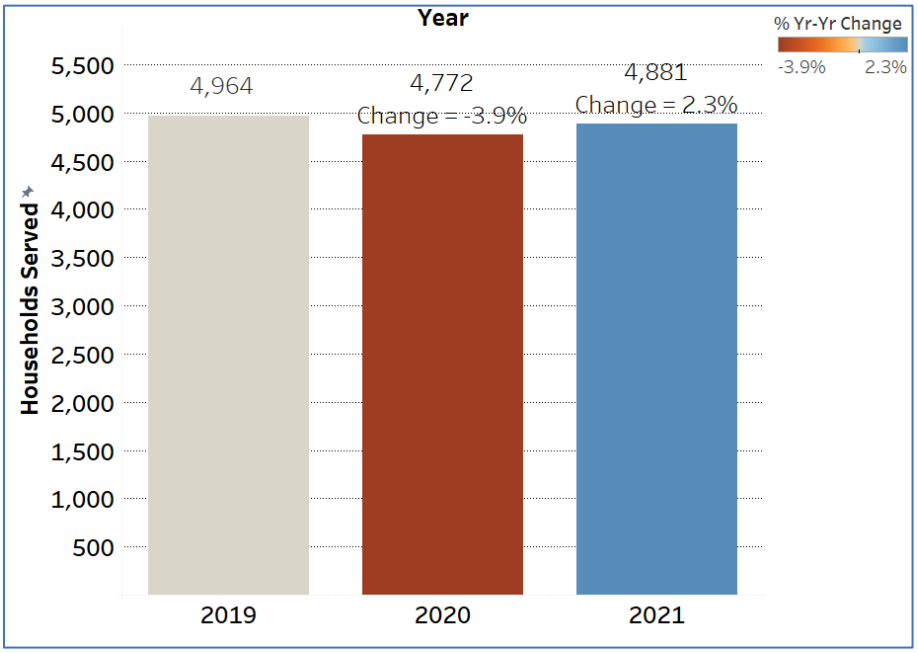
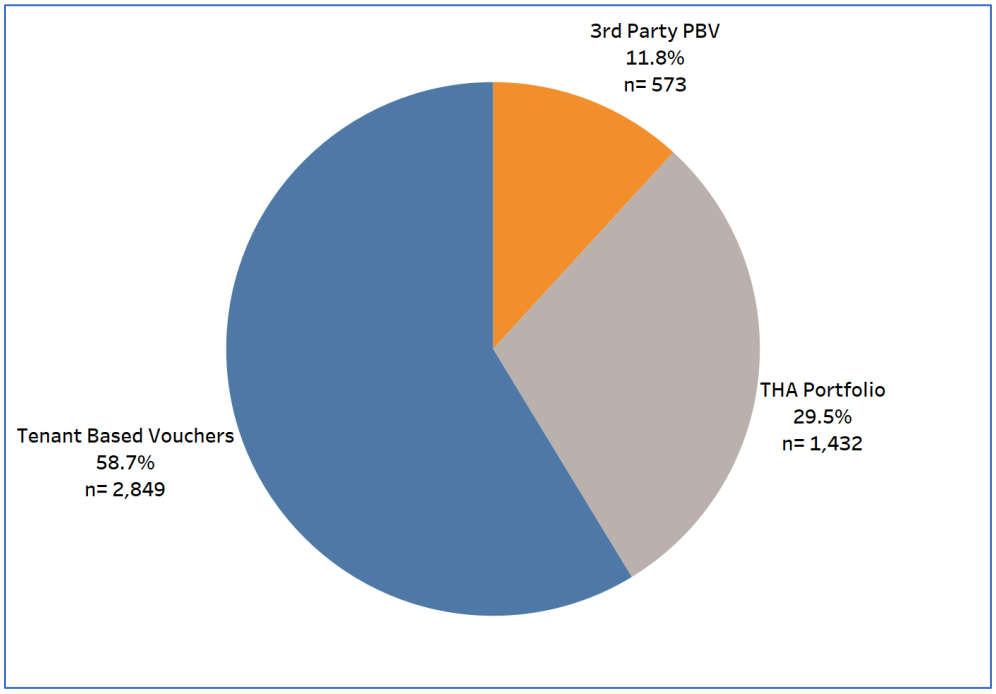


Figure 2. 2021 Households Served by Program

The majority of households were served in the Tenant Based Voucher Program, representing 2,849 (58.7%) of 4,854 voucher households served in 2021.[3]



[2] Excluding Property-Based Subsidy, Local Non-Traditional Households, and Port Outs.

[3] Excluding Property-Based Subsidy, Local Non-Traditional Households, Port Outs, and Homeownership Program Vouchers.

Figure 3. Proportion of Total Households Served by Program, 2019-2021

While the majority (~60%) of households were served in Tenant Based Voucher programs, **the proportion (and total number) of TBV households decreased while those served in THA Portfolio and 3rd Party PBV Programs increased from 2019-2021**.

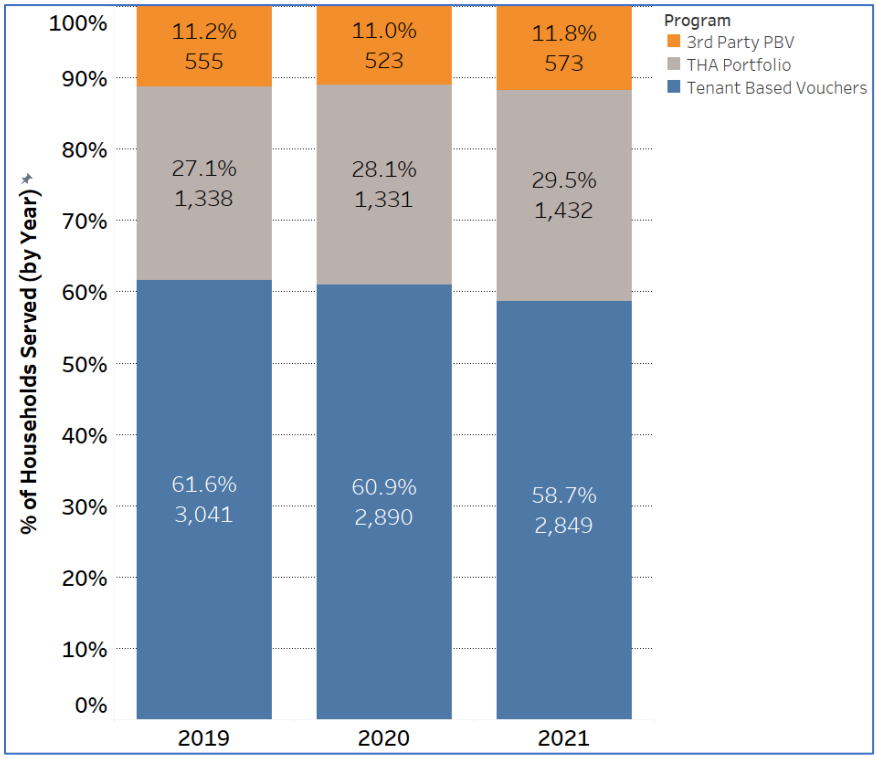


Figure 4. Overall Program Entries and Exits, 2019-2021

The majority of households served remain on program from year to year (85.6% in 2021). In 2021, the proportion of all household entries and exits were nearly equal, at 7.2% and 7.0%, respectively, while 0.2% of all households served entered and exited in the same calendar year. In 2020, there was a decrease in the proportion of new entries and exits, likely a reflection of Washington State's Eviction Moratorium which ended June 30, 2021. Percentages are based on proportion of total by year.

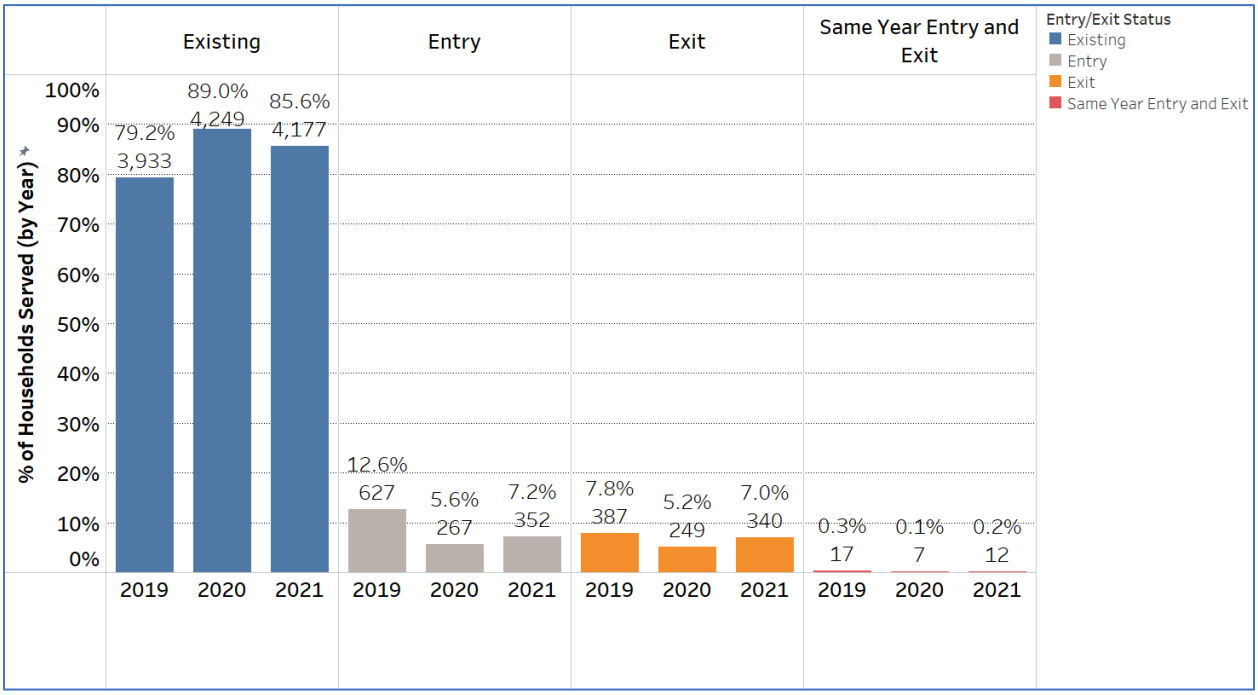
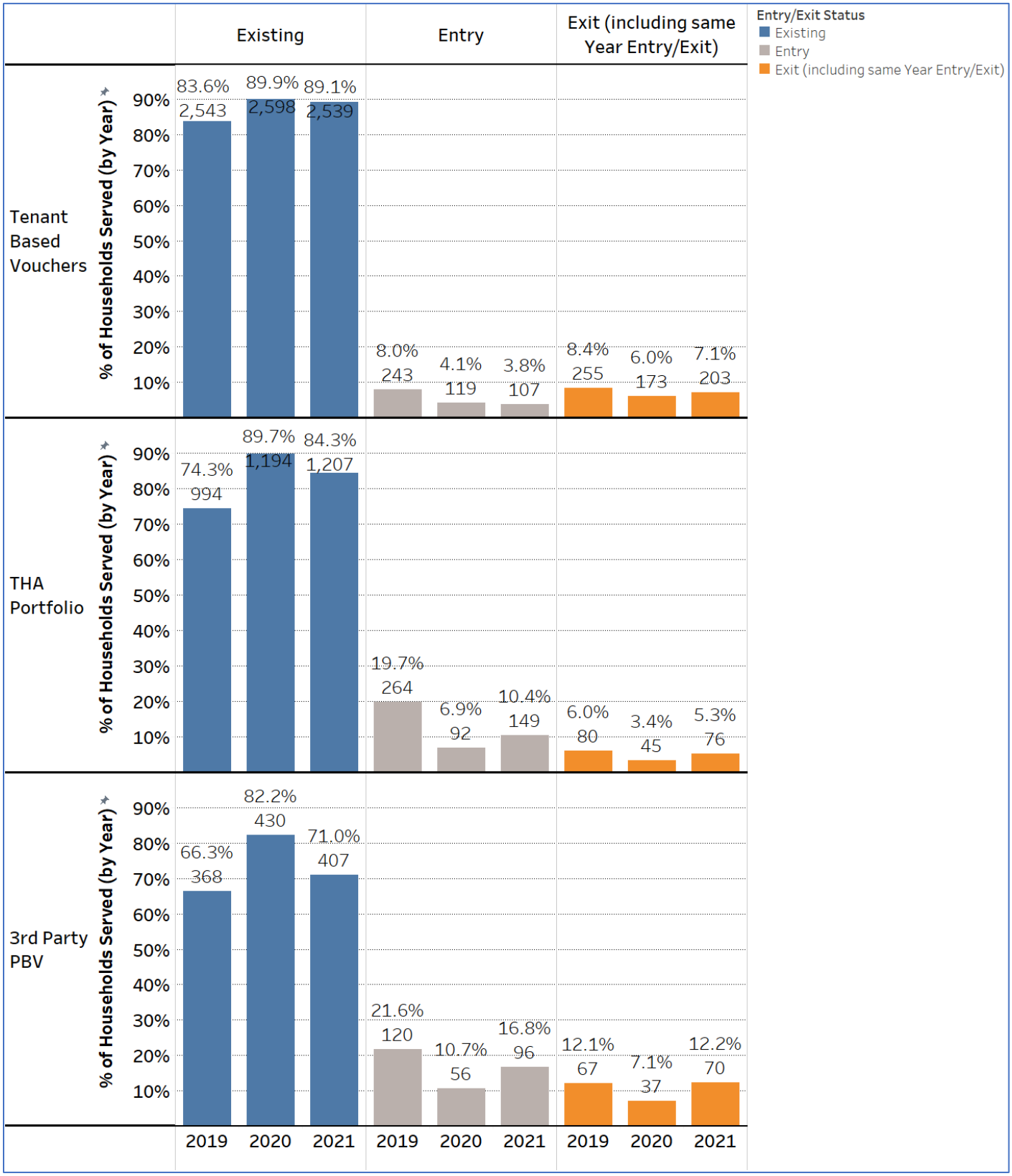


Figure 5. Entries and Exits by Program, 2019-2021

Household turnover differs by program, with the highest rates of exiting found in the 3rd Party PBV population (12.2% in 2021, including Same Year Exit) and the lowest rates of exiting in the THA Portfolio population (5.3% in 2021, including Same Year Exit). Decreases in attrition can be seen in 2020 for all Program areas, however the impact of Eviction Moratorium may have affected these rates differently.



2. Geographic Distribution of Households Served

Figure 6. 2021 Households Served by ZIP Code

Variation in the number of households served by ZIP code in 2021 can be seen by the color gradient. Darker ZIP codes indicate more households served while lighter colors indicate ZIP codes with fewer households served. Showing ZIP codes with at least 5 households served. **The ZIP code with highest number of households served in 2021, 953 (19.6%), was 98404 on the East side of Tacoma. Zip codes 98404, 98405, and 98409 represented 46.5% of 2021 households.**

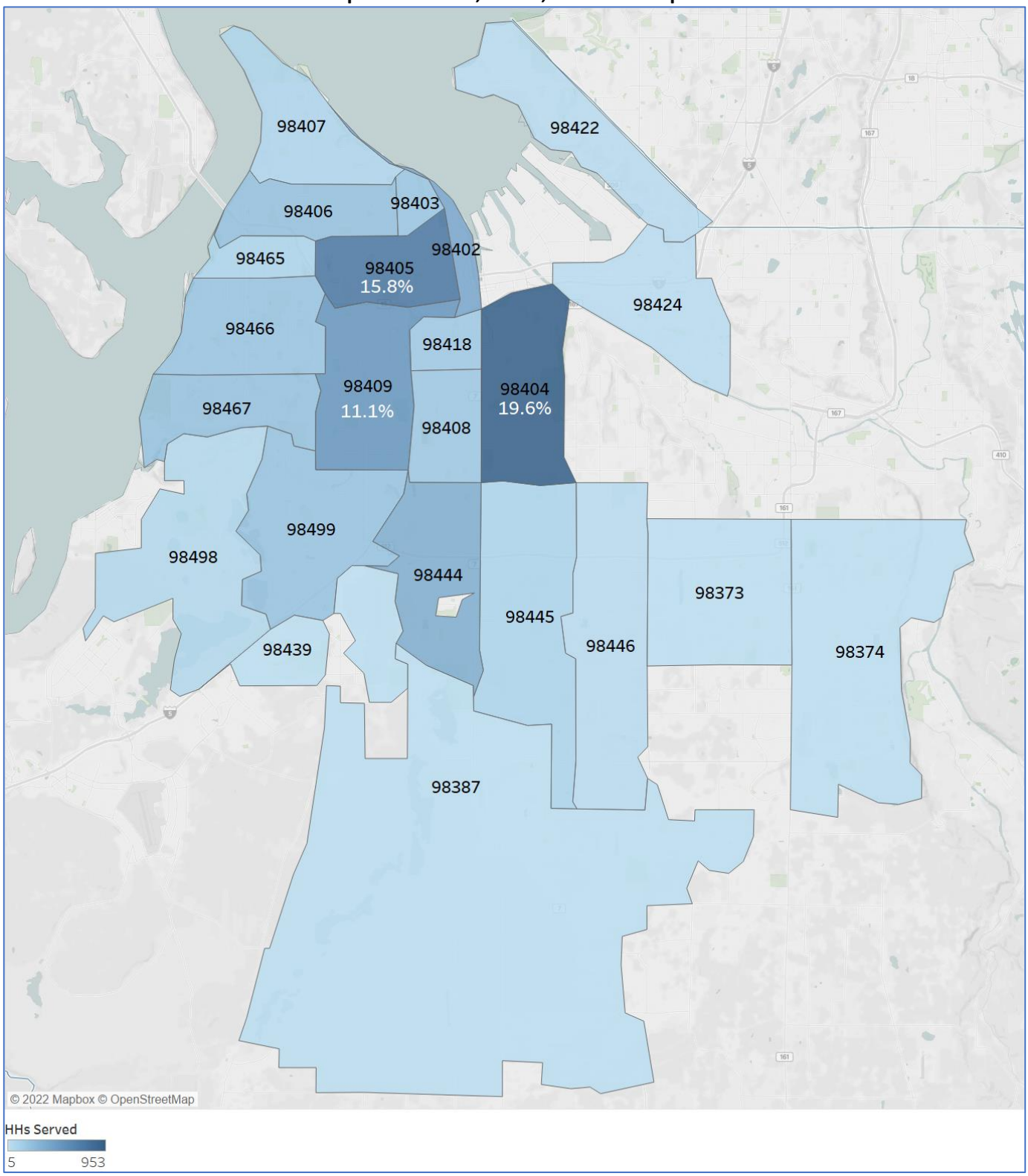
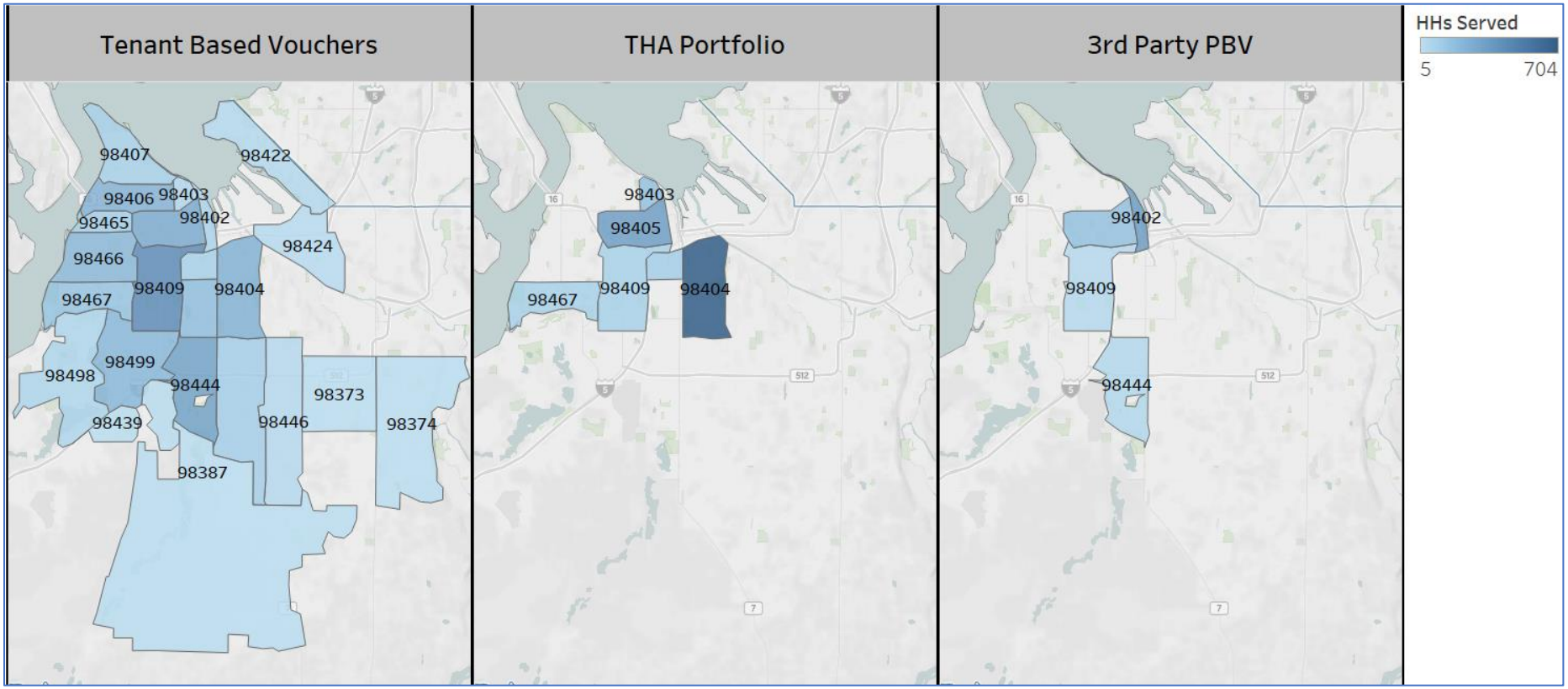


Figure 7. 2021 Households Served by ZIP Code and Program

Since THA Portfolio and 3rd Party PBV programs are property-specific, their household distribution is much narrower than the Tenant Based Voucher Program, which generally function by subsidizing households to find apartments on the private market throughout THA's jurisdiction. Variation in the number of households served by ZIP code and program in 2021 can be seen by the color gradient. Darker ZIP codes indicate more households served while lighter colors indicate ZIP codes with fewer households served. Showing ZIP codes with at least 5 households served. The ZIP code with the highest number of households served, 98404, was composed of a majority in the THA Portfolio Program, 704, and a smaller proportion in the Tenant Based Voucher Program, 236.



3. Race and Ethnicity of THA Head of Households Served

Figure 8. 2021 Overall Households Served by BIPOC, White, Unknown

In 2021, THA served a larger portion of Black, Indigenous, and People of Color (BIPOC)-headed households compared with white-headed households (48.8% and 34.2%, respectively), after accounting for Unknown Race and Ethnicity. 830 (17.0%) households had a Head of Household who had not self-identified a Race and/or Ethnicity category. This reduces the power of some comparisons by Race/Ethnicity demographics. 87 (1.8%) Households had an Unknown Race however had self-reported Hispanic or Latino origin; these households have been categorized in the BIPOC population for this comparison.

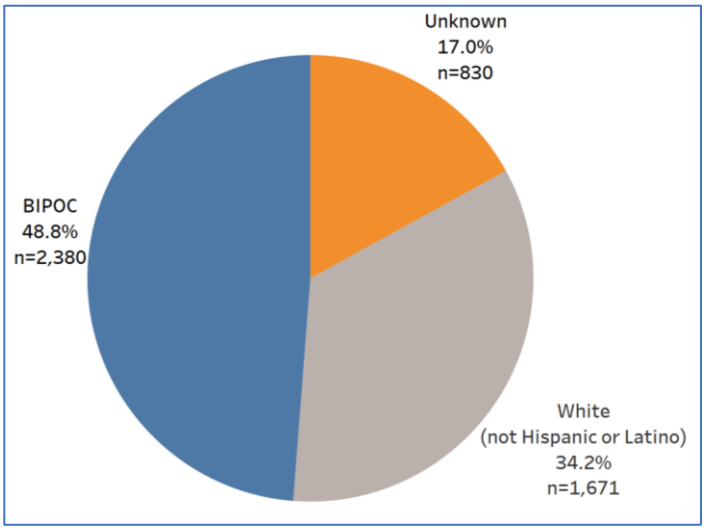


Figure 9. 2021 Households Served by Head of Household Race/Ethnicity

Among households served in 2021, 1,860 (38.1%) Households had a Head of Household which identified as White, and 1,359 (27.8%) Households had a Head of Household who identified as Black or African American (of any Ethnicity). The largest proportion within any Racial group whose Head of Household self-identified as Hispanic or Latino was seen with White Head of Households at 3.9%. Percentages shown are out of total 4,881 Households served in 2021. 917 (18.8%) Households had a Head of Household with unknown Race and/or Ethnicity.

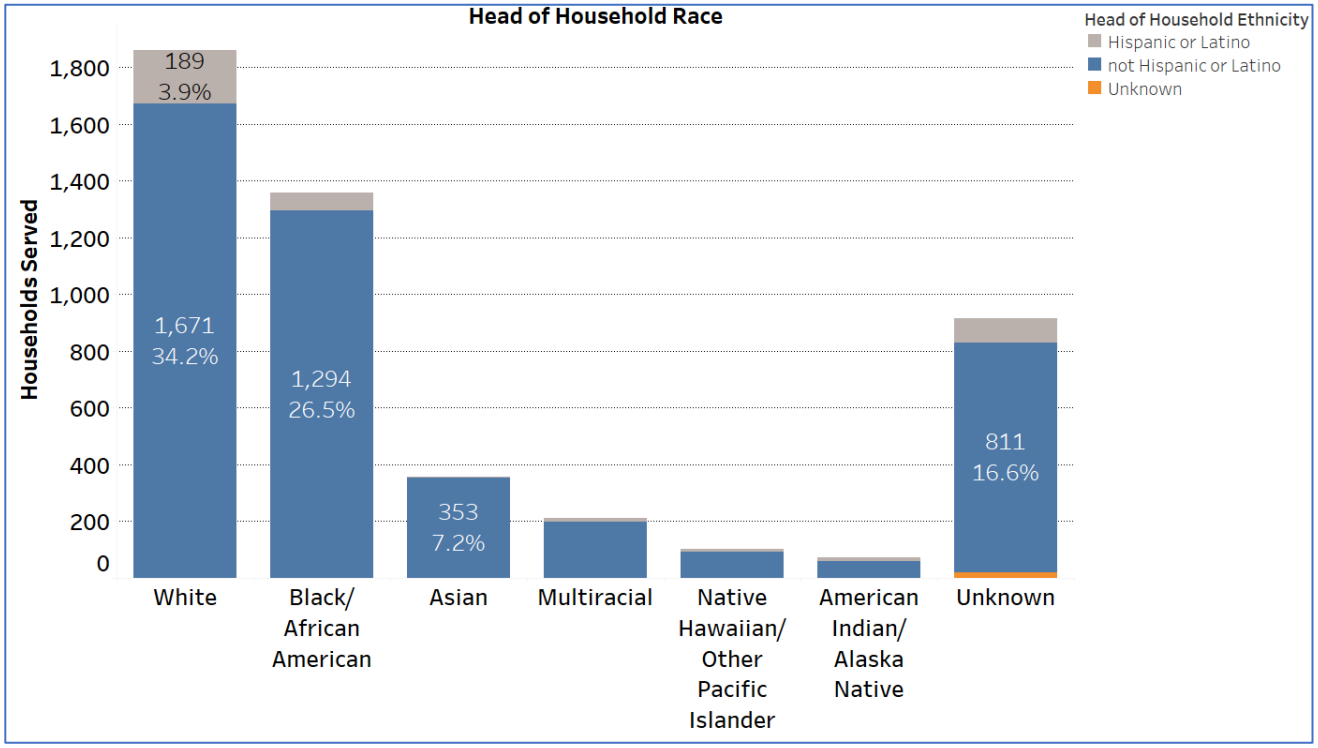


Figure 10. 2021 Households Served by BIPOC, White, Unknown and Program

In 2021, the largest relative portion of BIPOC Households served was seen within the THA Portfolio Program at 844 (58.9%) of the 1,432 THA Portfolio Households; this program also had the lowest proportion of Unknown Head of Household Race/Ethnicity. Unknown Race/Ethnicity contributed larger portions to total households served in the 3rd Party PBV and Tenant Based Voucher programs (29.1% and 16.8%). **This may affect racial/ethnic comparisons and may indicate differences in data capture practices.**

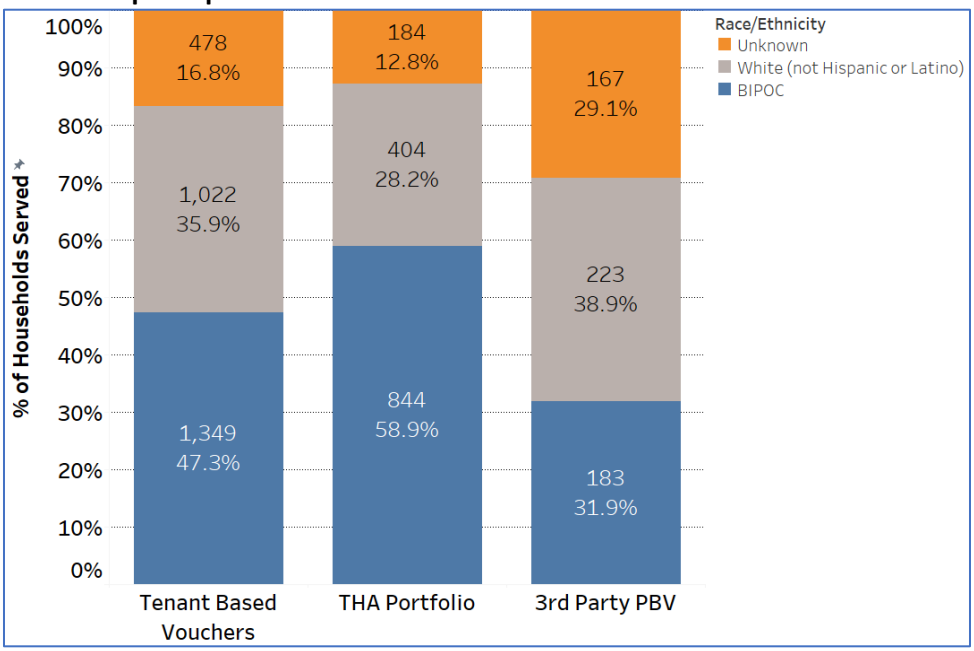
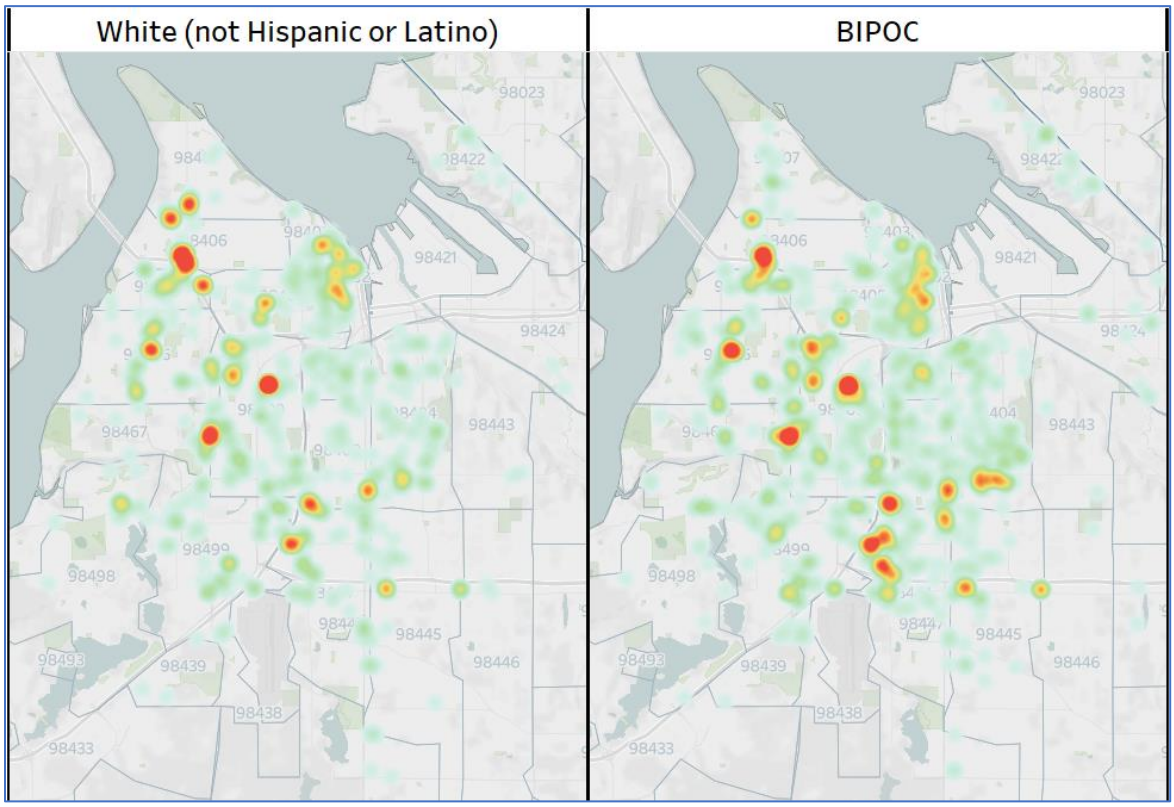


Figure 11. 2021 Tenant Based Voucher Geographic Distribution, BIPOC and White

Some variation in geographic distribution between White (non-Hispanic or Latino) and BIPOC households in the Tenant Based Voucher Program can be seen, **most notably with greater concentration of BIPOC households to the southeast regions of Tacoma.**



4. Comparing Race/Ethnicity of THA Households with Census Data

Figure 12. Families in Tacoma by Race/Ethnicity

Representation of Families in Tacoma ZIP Codes, showing percentage of total families by Race/Ethnicity and number of Families. **The size of the rectangles corresponds to proportional percentage of the total population.** Tacoma had 87,350 families, with 1,319 American Indian and Alaska Native families, which represents 1.5% of the total population of families in Tacoma in 2020. *Source: 2020 American Community Survey 5 Year Estimates.* NHOPI = Native Hawaiian and Other Pacific Islander. AIAN = American Indian and Alaska Native.

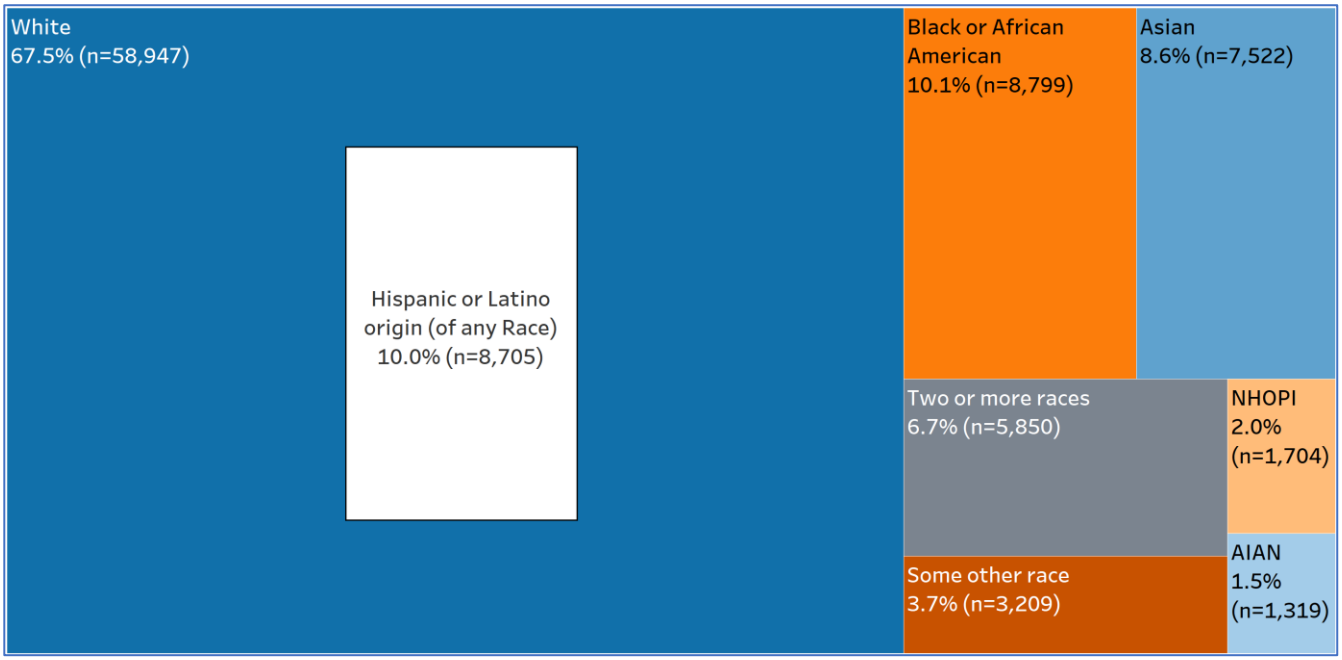


Figure 13. 2020 Family Poverty Rates in Tacoma, by Race/Ethnicity

Poverty rates vary by Race/Ethnicity, with rate and number of families below Federal Poverty Limits shown. Ex. 238 American Indian and Alaska Native families were beneath Federal Poverty Thresholds, which represents 18.0% of the total 1,319 American Indian and Alaska Native families in Tacoma in 2020. *Source: 2020 American Community Survey 5 Year Estimates.*

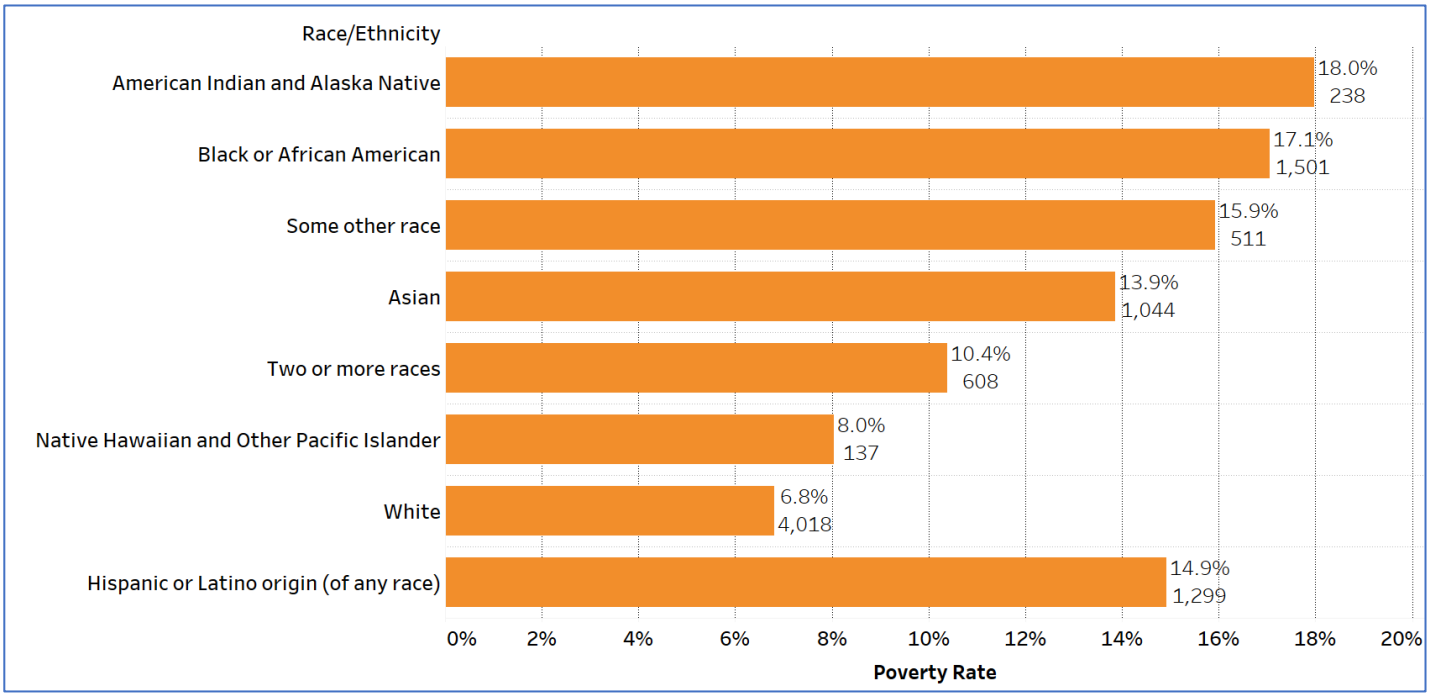
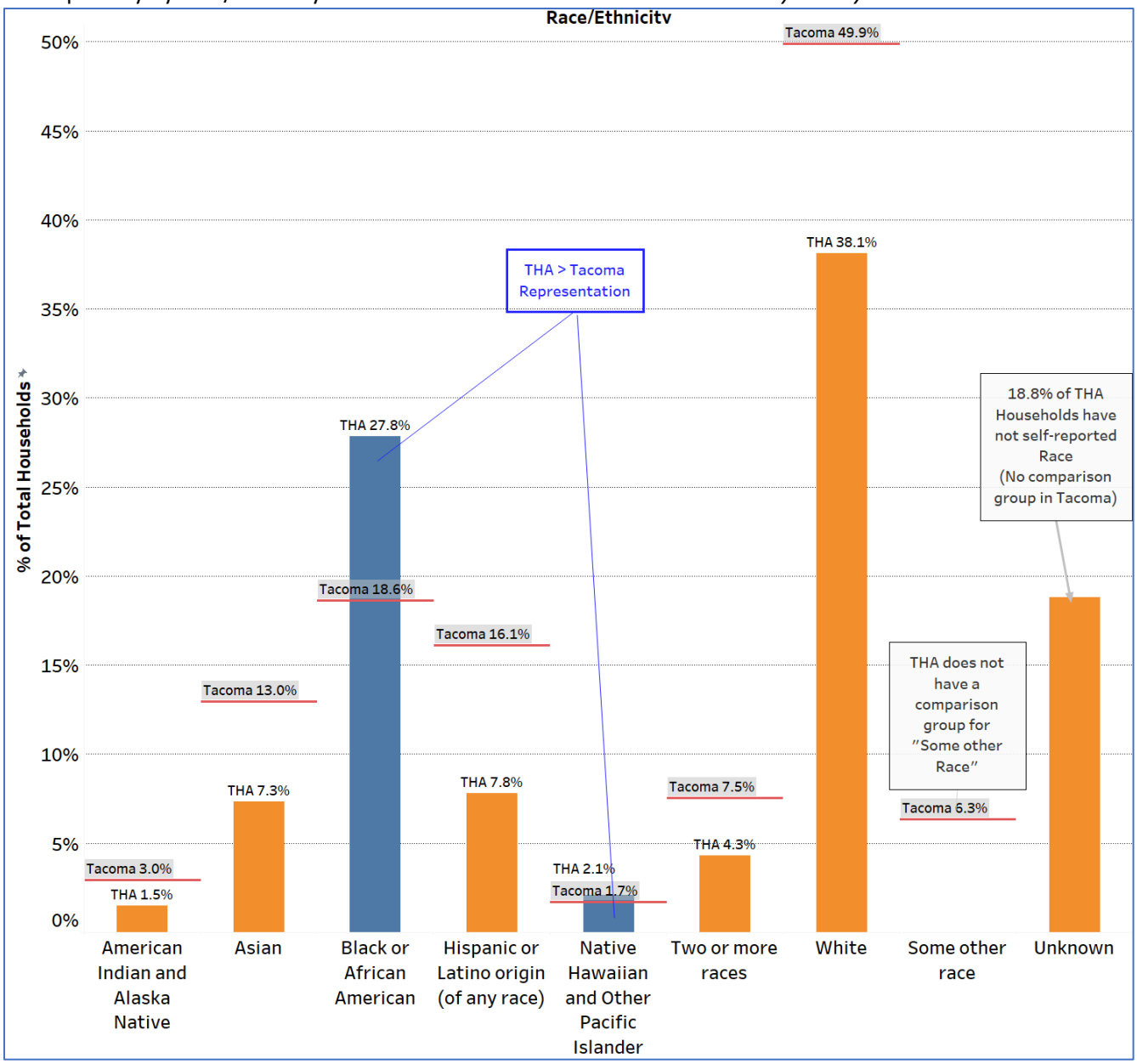


Figure 14. Proportion of THA Households Served Compared with Tacoma Families in Poverty, by Race/Ethnicity

Among the Race/Ethnic groups represented in Tacoma and served by THA in 2021, Black or African American- and Native Hawaiian and Other Pacific Islander-headed Households were most-highly represented when compared with each groups' corresponding proportion of families beneath Federal Poverty Thresholds in Tacoma (horizontal red bars). Blue bars represent groups with are over-represented (orange bars, under-represented), when comparing THA Households served with Tacoma Families in Poverty. Take-away: if the bars and horizontal lines were equal for every group shown, then the proportion of THA households served by race/ethnicity would match the proportion of Tacoma families in poverty by race/ethnicity.[4,5] *Tacoma Source: 2020 American Community Survey 5 Year Estimates.*



[4] Note: Federal Poverty Thresholds may not correspond to THA criteria for program eligibility based upon % Household Area Median Income. However, both account, at least partially, for household size. These unequal categorizations may have affected the comparative rates depicted in this visual.

[5] THA rates shown are comprised of the percentage of Race/Ethnic group out of all Households served in 2021 (ex. THA served 1,810 households with a White Head of Household, which represents 37.1% of the total 4,881 households served in 2021). Tacoma rates shown are comprised of the number of families in poverty for each Race/Ethnic group out of all families in poverty (ex. 4,018 White families in Tacoma were beneath Federal Poverty Thresholds, representing 49.9% of the total 8,057 families in Tacoma which were below Federal Poverty Thresholds in 2020).

5. Gender of Head of Household

Figure 15. 2021 Households Served by Head of Household Gender

In 2021, Female-headed households significantly outnumbered Male-headed households almost 3 to 1, at 3,588 (73.8%) and 1,274 (26.2%), respectively. Presence of Co-Head of Households may change the ratio as well (not shown). In another component of this analysis, differences in income by Head of Household Gender, Household Size, and Number of Children have been presented (Figures A4, A6-8).

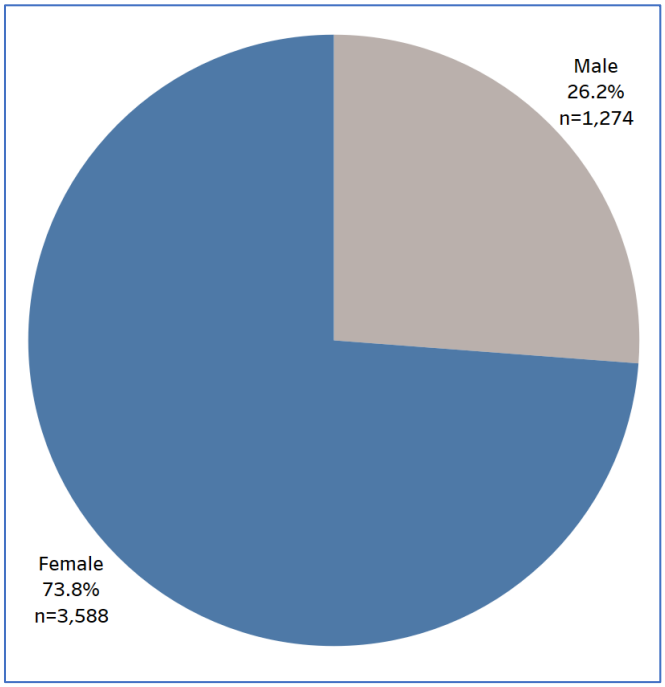
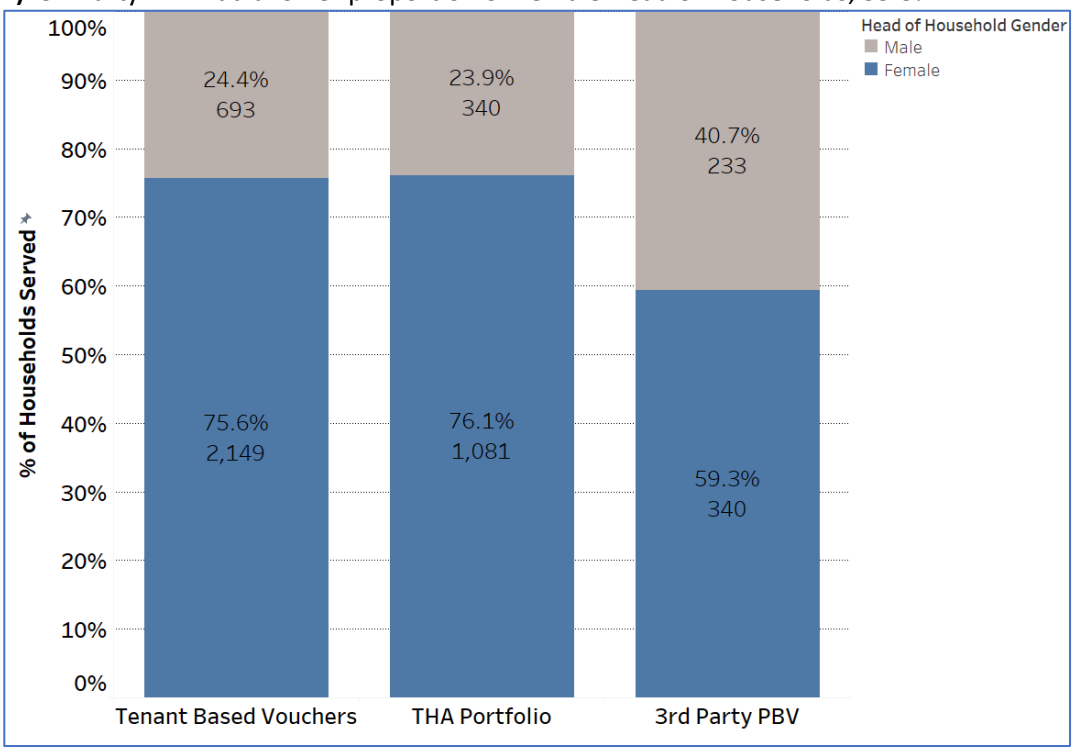


Figure 16. 2021 Households Served by Head of Household Gender and Program

Proportions of Gender of Head of Household varied by Program in 2021, with the highest relative proportion of Female Head of Households seen within the THA Portfolio Program at 76.1% (followed closely by Tenant Based Vouchers, 75.6%). 3rd Party PBV had a lower proportion of Female Head of Households, 59.3%.



6. Elderly and Disability Status of Household

Figure 17. 2021 Households Served by Household Elderly and Disability Status

In 2021, 45% of all Households served were Disabled and 30% were Elderly (orange bars combined). A higher proportion of Disabled Households were also Elderly (46.2%) compared with Households which were not Disabled (17.4%).

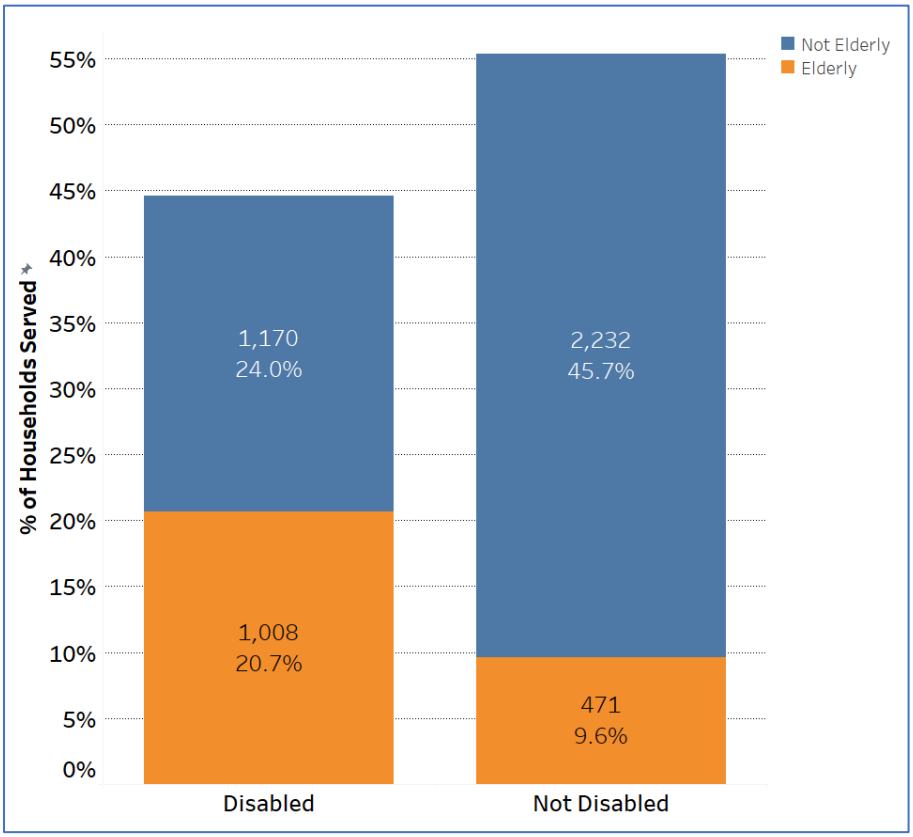
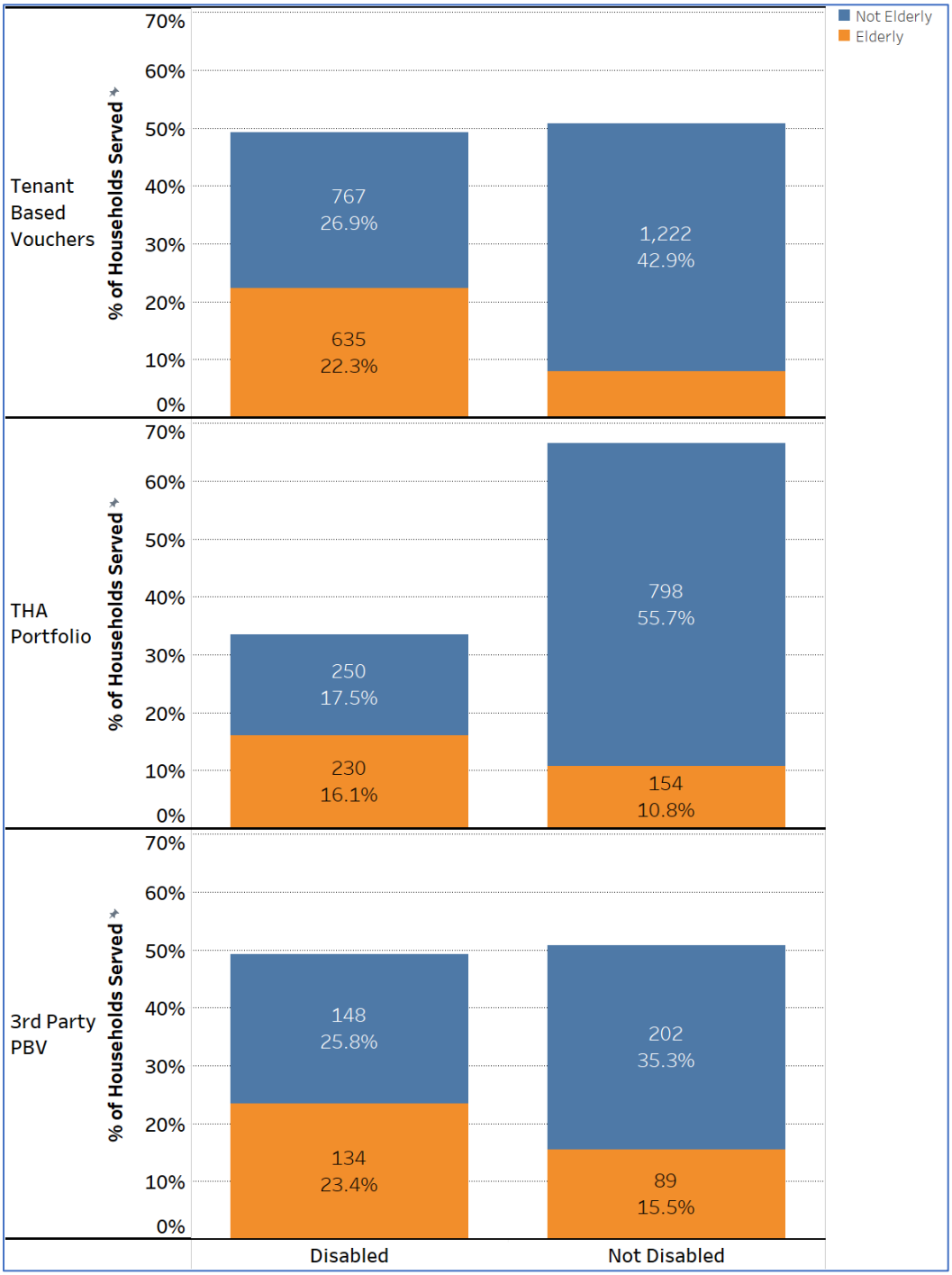


Figure 18. 2021 Households Served by Household Elderly, Disability Status, and Program

In 2021, the Tenant Based Voucher and 3rd Party PBV Programs had the largest proportion of households who were disabled, 49.2%. The largest proportion of Elderly (62+) households was with the 3rd Party PBV, 39.0%.



7. Age of Head of Household

Figure 19. 2021 Households Served by Age of Head of Household

Head of Households 60-69 years of age were the most numerous served (1,068 or 21.9%) for all 10-year age groups in 2021. Those below 20 or above 89 years old account for 1.0% of the total 4,881 Households served. Median = 53.

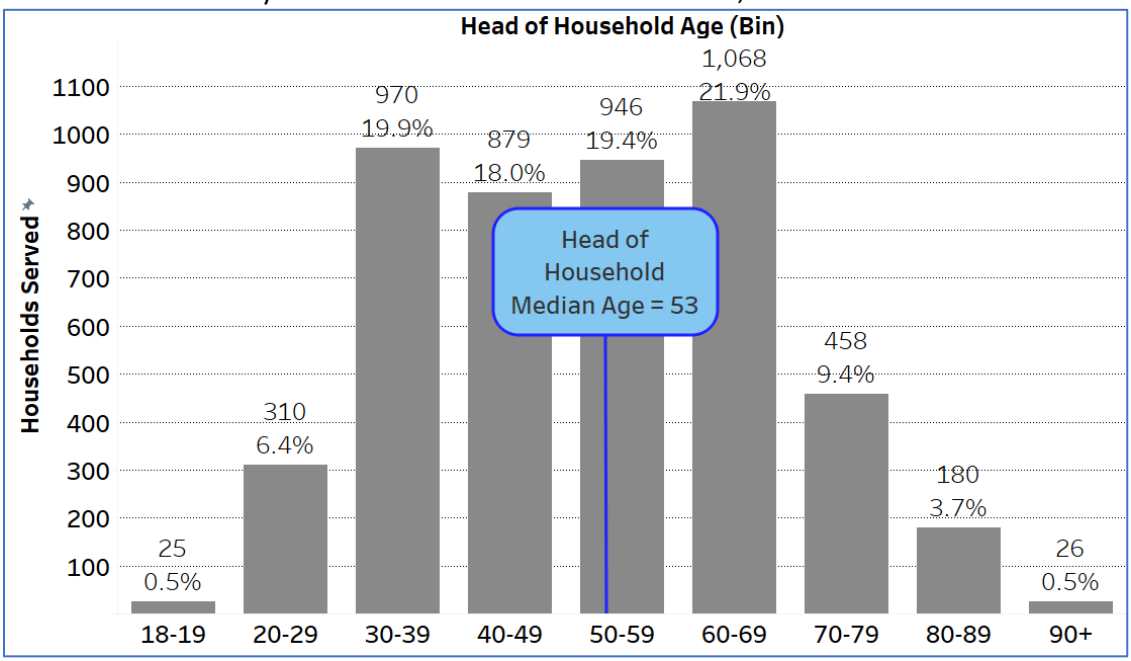
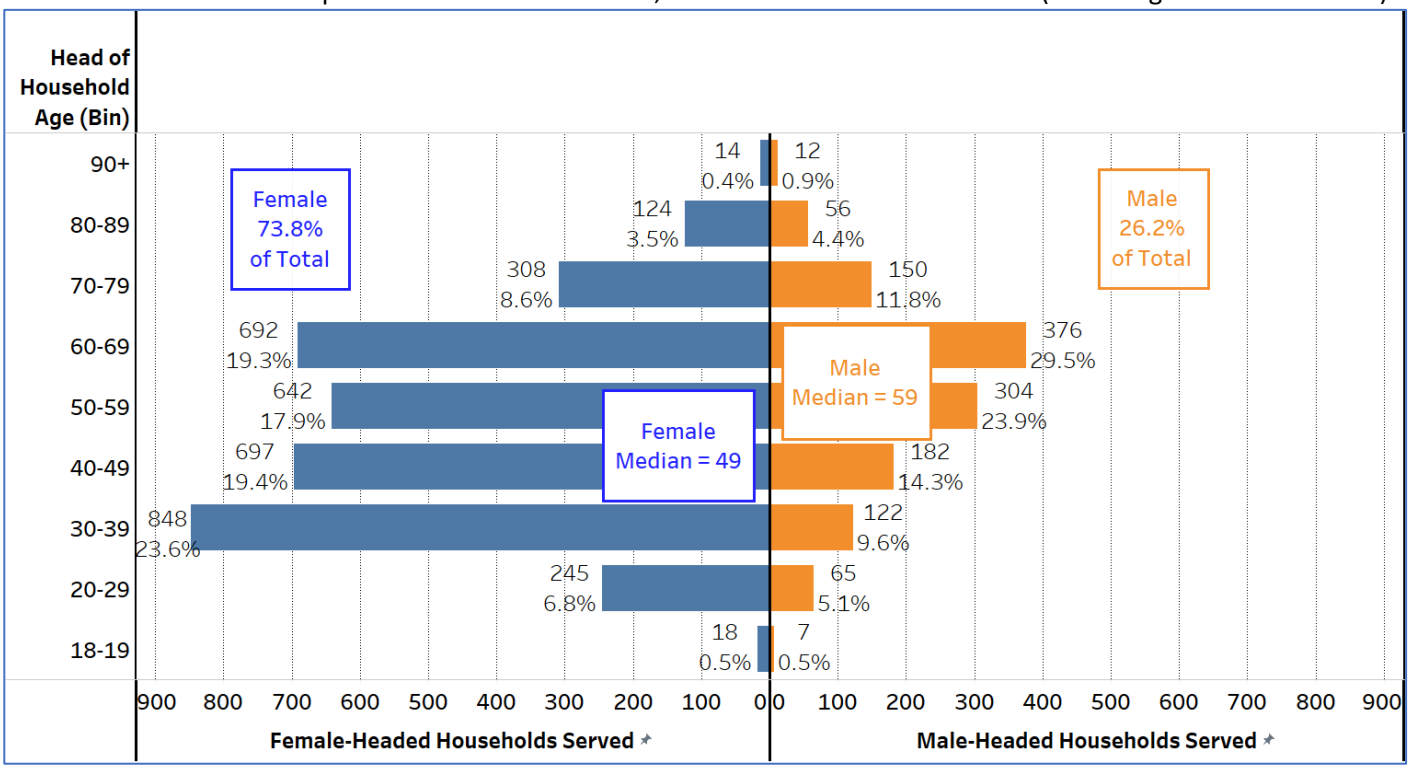


Figure 20. 2021 Households Served by Age and Gender of Head of Household

Age distribution of Households Served differed by Gender of Head of Household, with Females aged 30-39 being the most predominant category of all households served, at 848 (23.6%) of the 3,588 Female-Headed Households served in 2021. Male Head of Households aged 60-69 were the most predominant category among males, representing 376 (29.5%) of all the 1,274 Male-Headed Households served in 2021. Female-Headed Households represented 73.8% and Male-Headed Households represent 26.2% of the total 4,862 Households served in 2021 (excluding Unknown Gender).



8. Household Size

Figure 21. 2021 Households Served by Household Size

Of all Households served in 2021, 51% were single-person households, and nearly 70% were single or 2-person households. Household Size = number of persons in the household.

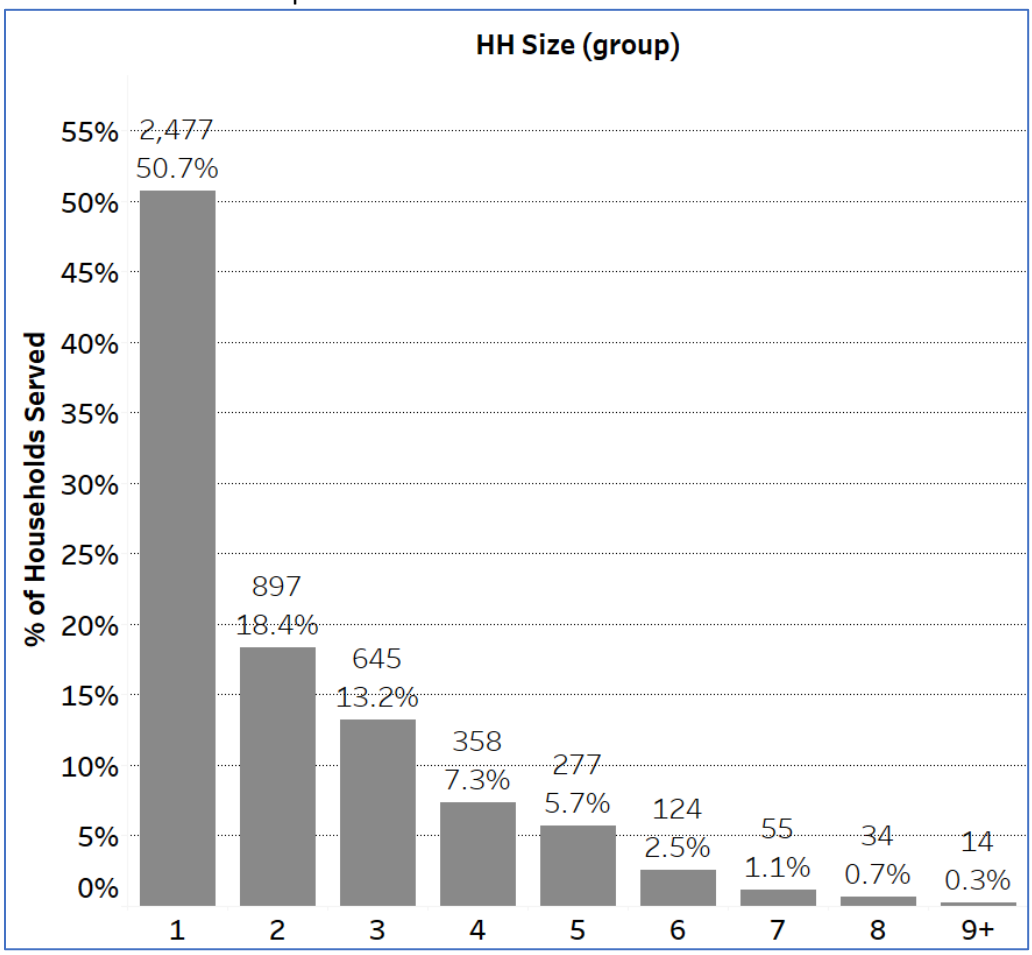


Figure 22. Overall Distribution of Households Served by Household Size and Program, 2021

Size of circles and percentages represent the proportion of households served out of all households served in 2021. For example, **30.1% of all households served were single-person households with Tenant Based Vouchers** (blue circle in the column labeled with a 1). This visual provides an additional way of comparing programs and Household size alongside the following chart. (All circles and percentages shown add up to 100% combined).

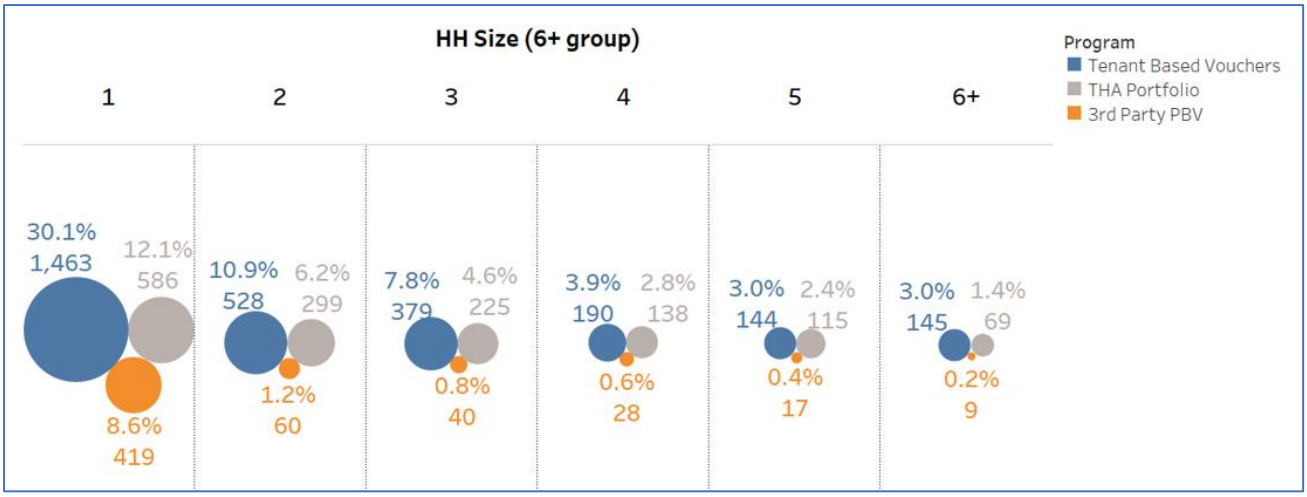
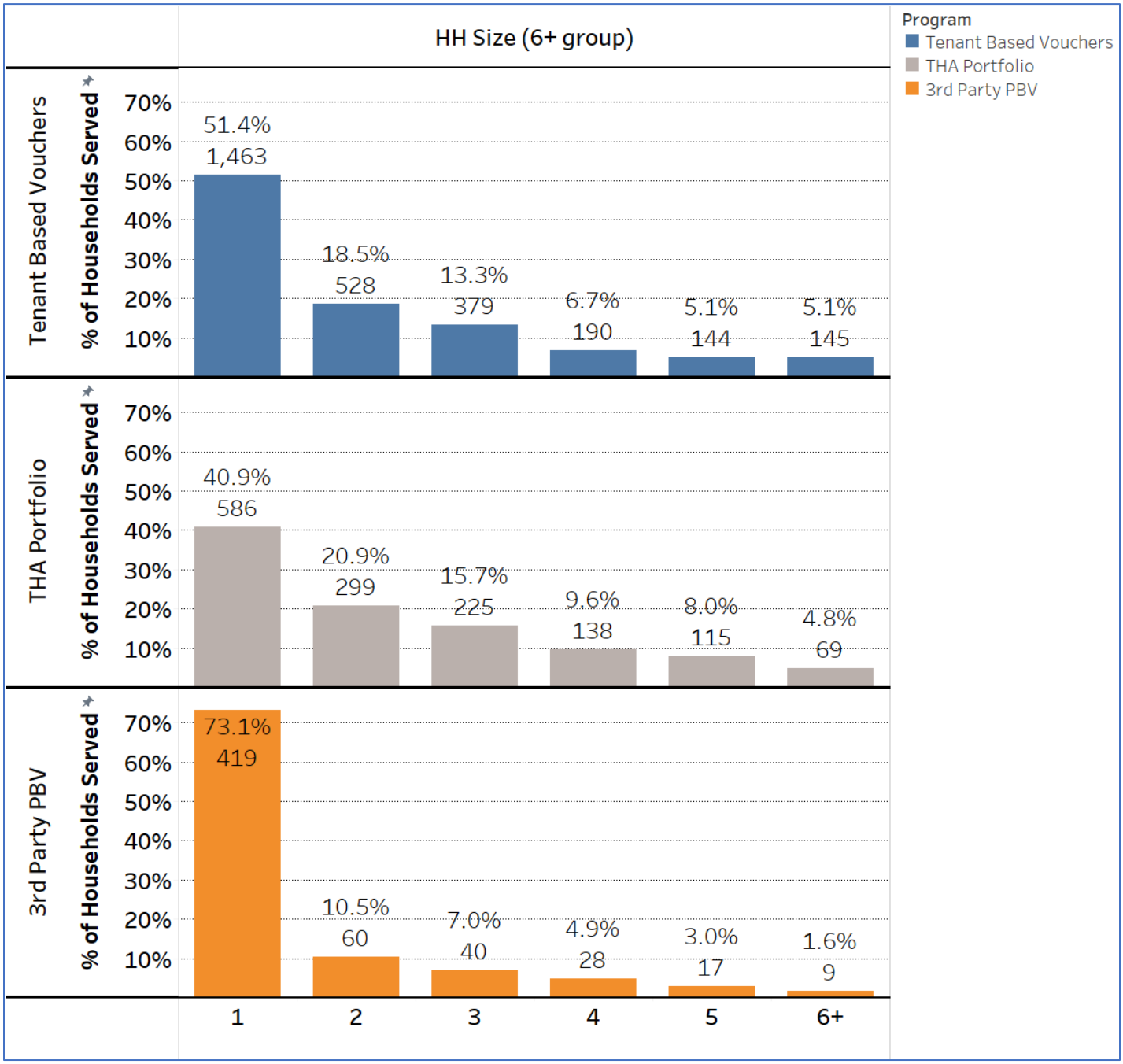


Figure 23. Program-Specific Distribution of Households Served by Household Size and Program, 2021

The distribution of households served by Household Size varied by Program. For example, 73.1% of 3rd Party PBV Households were single-person households, while 40.9% of THA Portfolio Households were single-person households in 2021. (Percentages are Program-Specific; colors independently add to 100%).



9. Household Income Comparisons

Figure 24. 2021 Low-Income Distribution by Program

Household distribution of Extremely/Very/Low-Income levels varies by Program. **3rd Party PBV Program Households had the highest proportion of Extremely Low-Income Households**, 91.6%, of all 3rd Party PBV Households served in 2021.

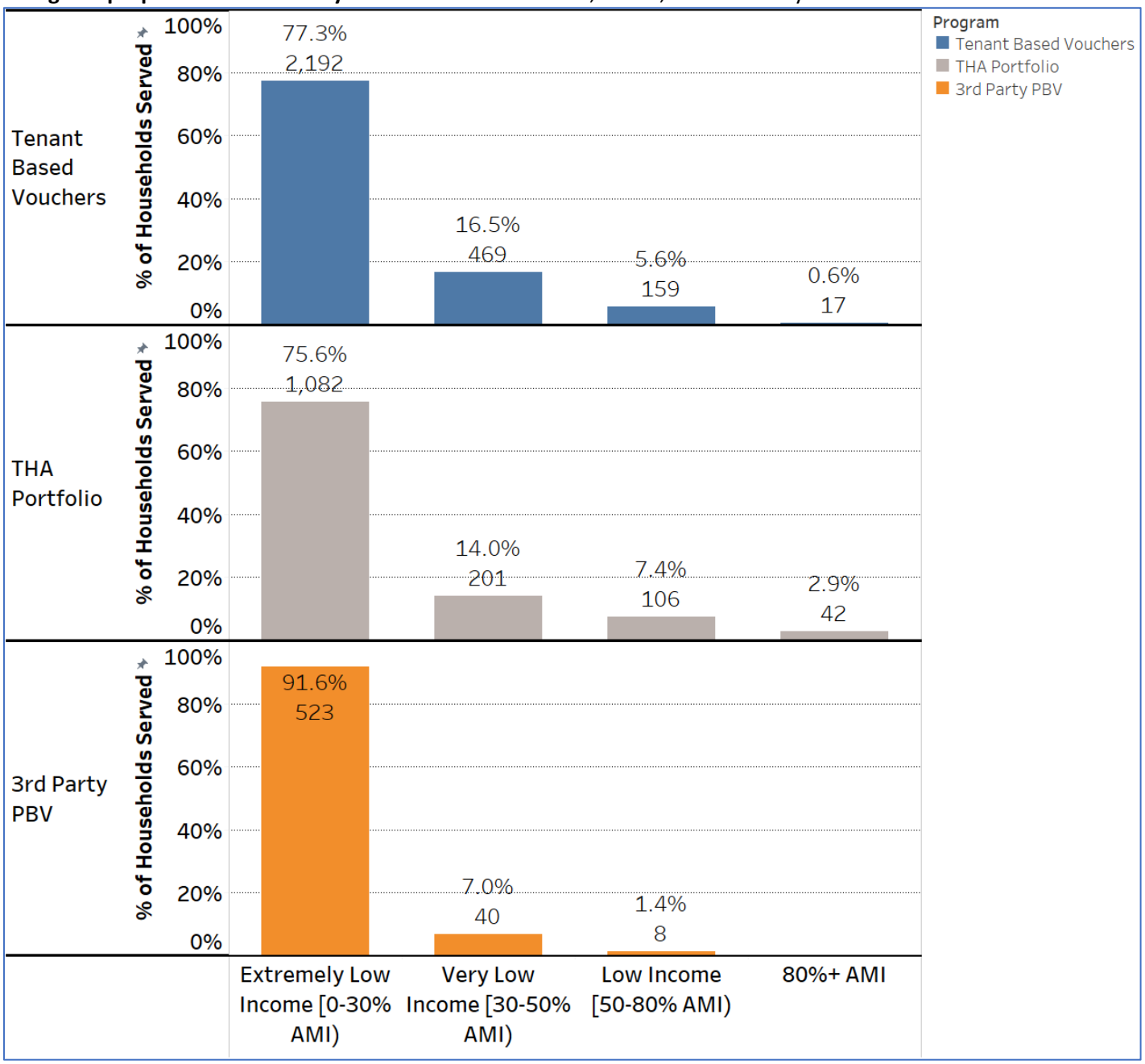


Figure 25. Household %AMI Distribution Trend, 2019-2021

From 2019-2021, increasing proportions of households served had AMIs in the 0-19% range, which corresponds to the lower 2/3s of the Extremely Low-Income group [0-30% AMI). Likewise, the upper 1/3 of the Extremely Low-Income Group saw decreases in representation from 2020-2021, and other decreases occurred in several of the higher %AMI ranges as well.

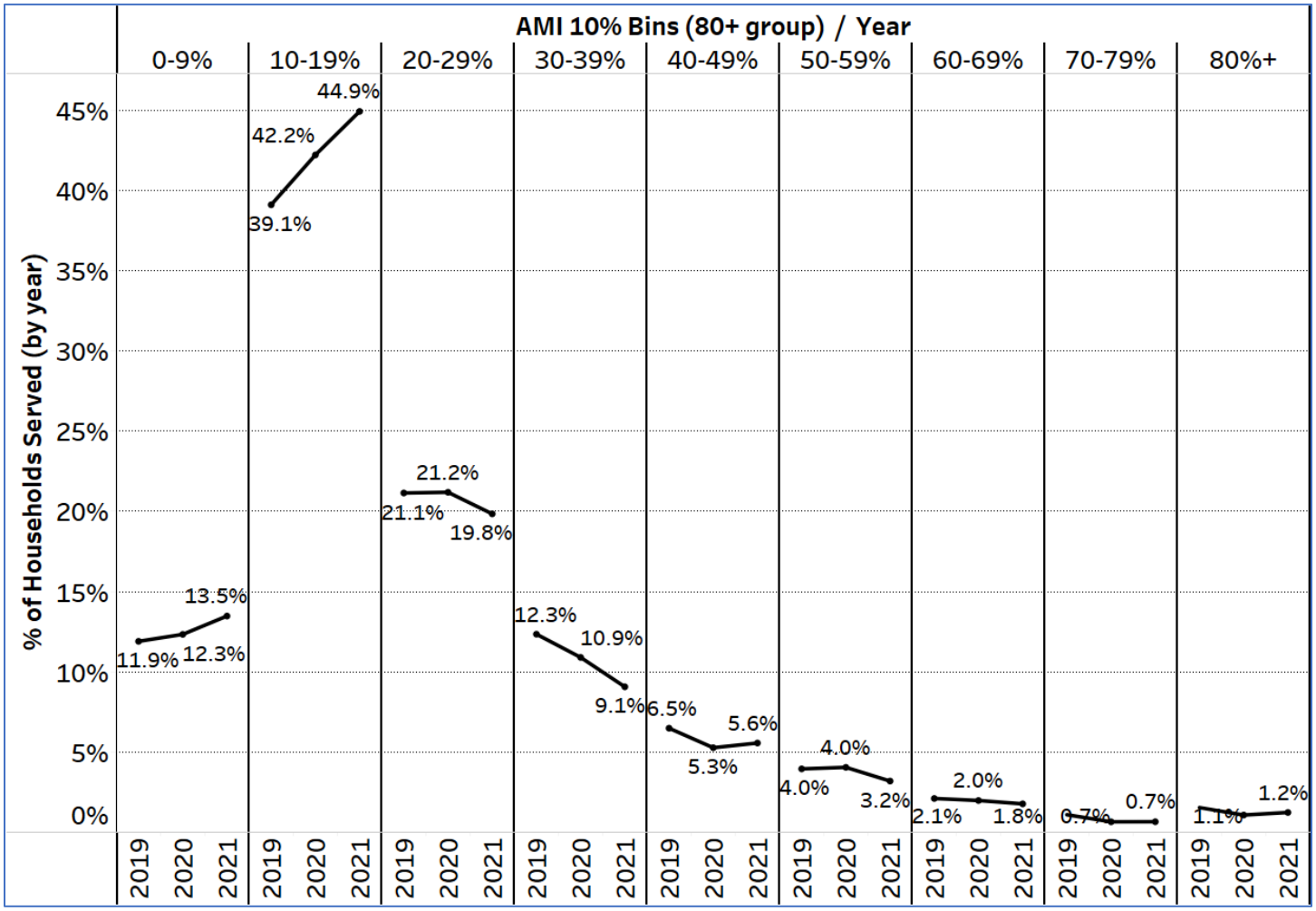
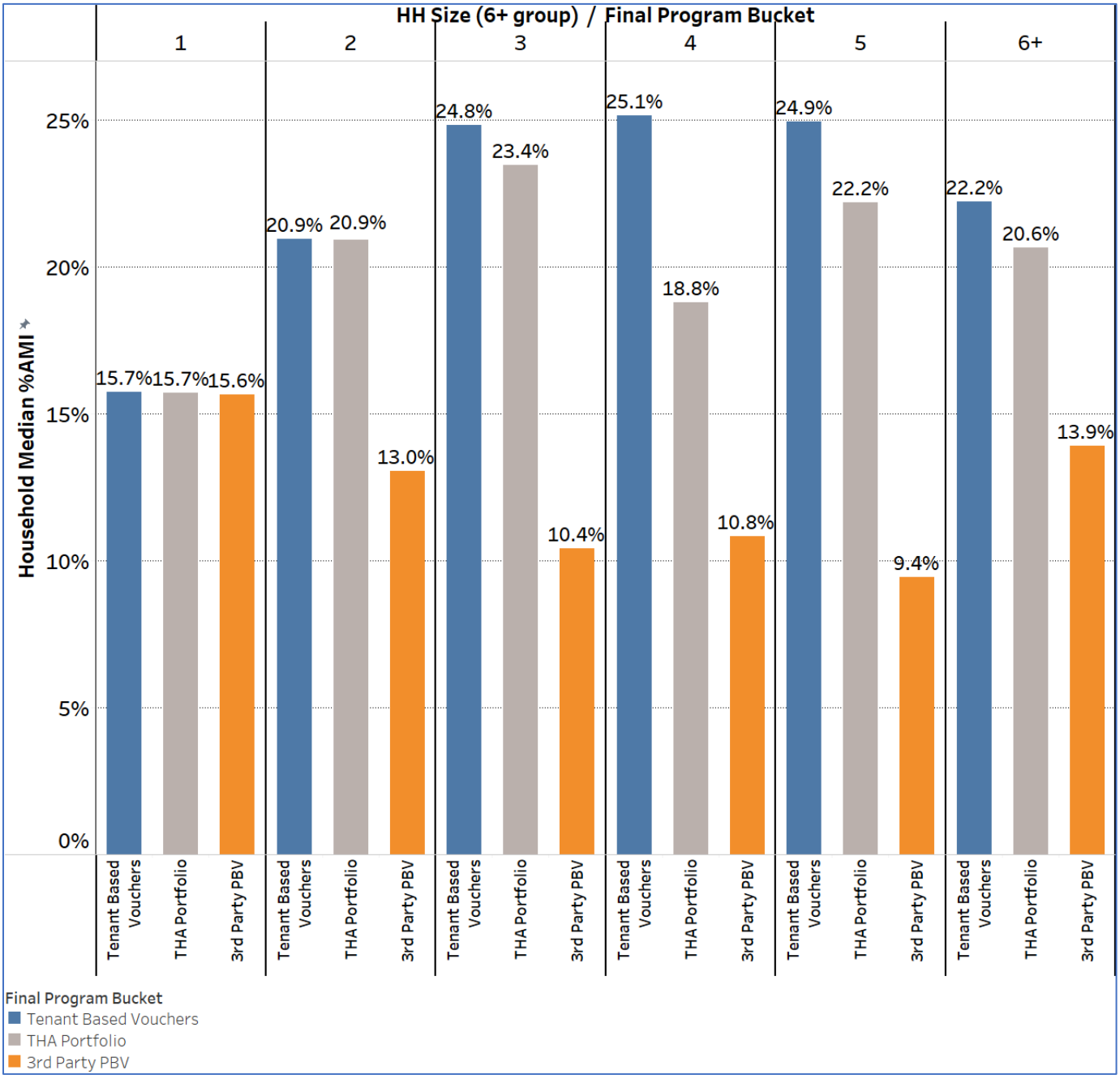


Figure 26. Median %AMI by Household Size and Program, 2021

Tenant Based Vouchers had the highest (3rd Party PBV had the lowest) household % AMI[6] for all household sizes served in 2021. Within each program group, variation in household AMI by household size can be seen, with 4-person Tenant Based Voucher households having the highest (5-person 3rd Party PBV having the lowest) %AMI of all groups shown, 25.1% and 9.4%, respectively.



[6] AMI- a % comparison of gross income to the Median Household Income in Tacoma, controlling for household size. Median is the numeric center of a distribution, equal to the 50th percentile measure. It was chosen over Average to avoid skewing the chosen statistic due to asymmetric distributions.

Figure 27. Median Household %AMI by Household Size and Head of Household Gender, 2021

Household Median %AMI varied by Head of Household Gender and Household Size. **For Households with 3+ individuals, households headed by males tended to have higher median %AMI than female households.** Male-headed households with 5 members had the highest %AMI, 28.0%, in 2021.

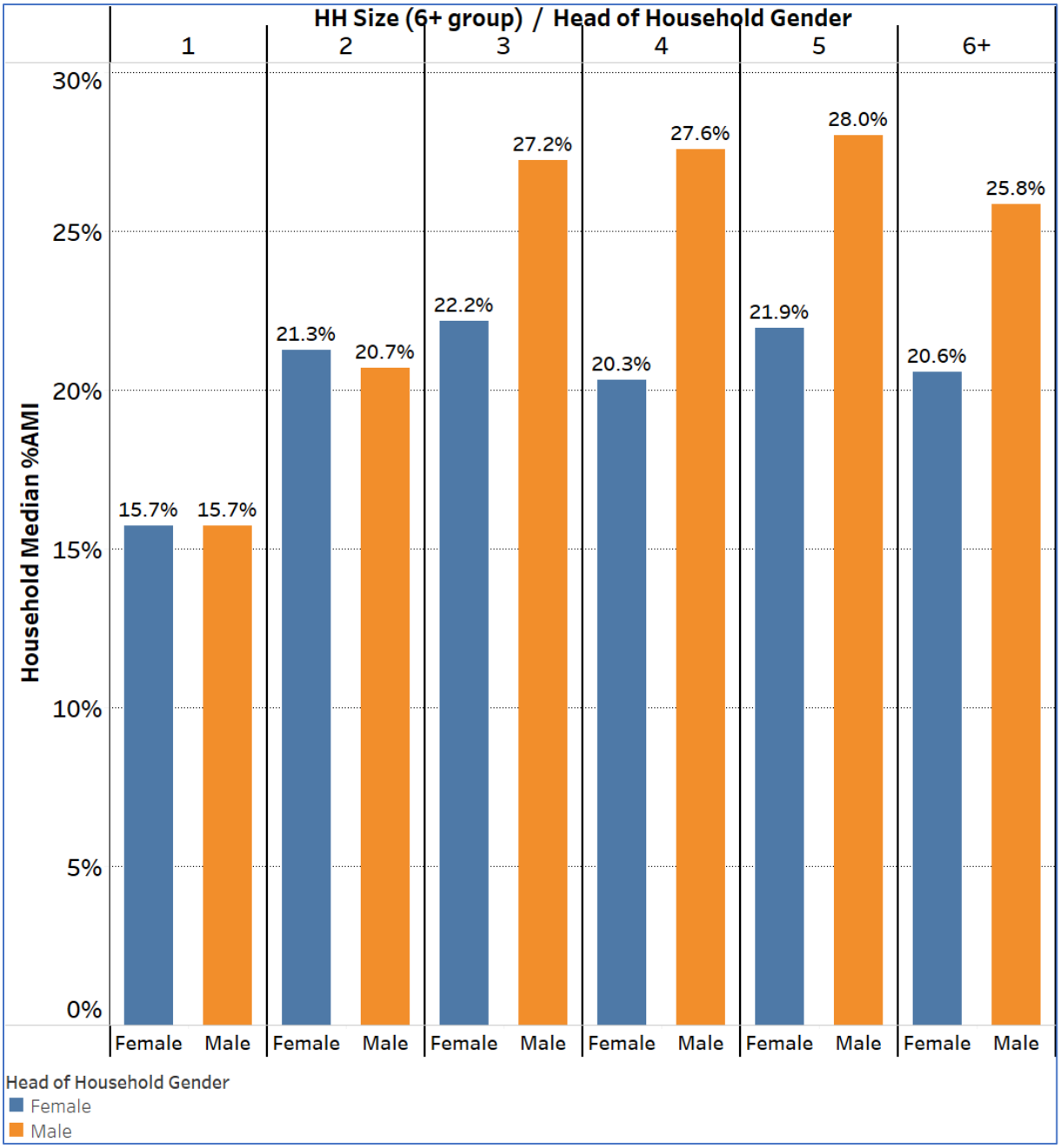


Figure 28. Median %AMI by Household Size and Head of Household Race/Ethnicity, 2021

Household Median varied by Head of Household Race/Ethnicity and Household Size. **For households with 3+ members, White (not Hispanic or Latino) head of households (Grey) tended to have higher %AMIs than BIPOC households (Blue).** Households headed by individuals of Unknown race/ethnicity (Orange) tended to have the lowest %AMI for households with 1-5 individual, however had the highest %AMI among households with 6 or more individuals.

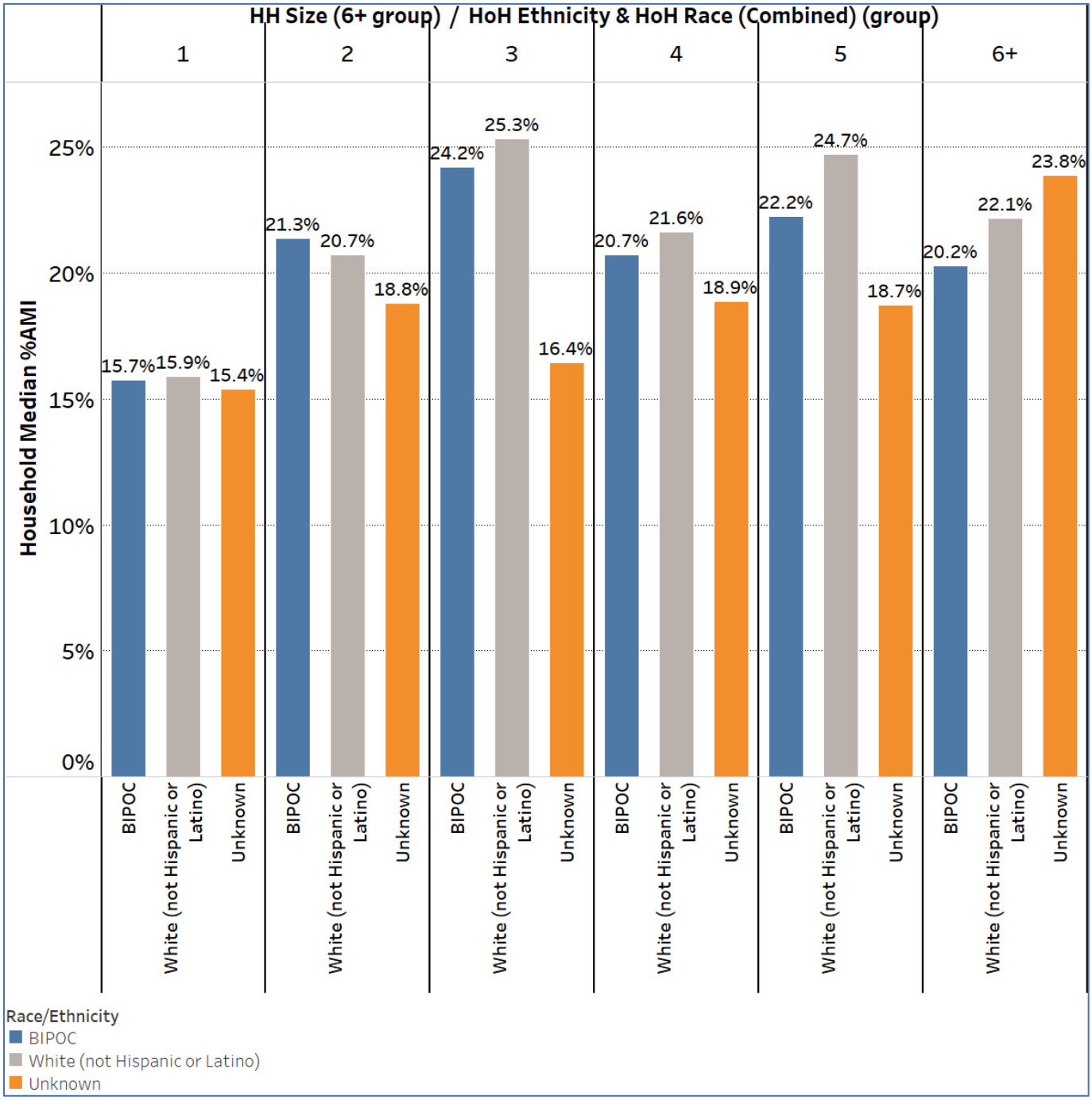
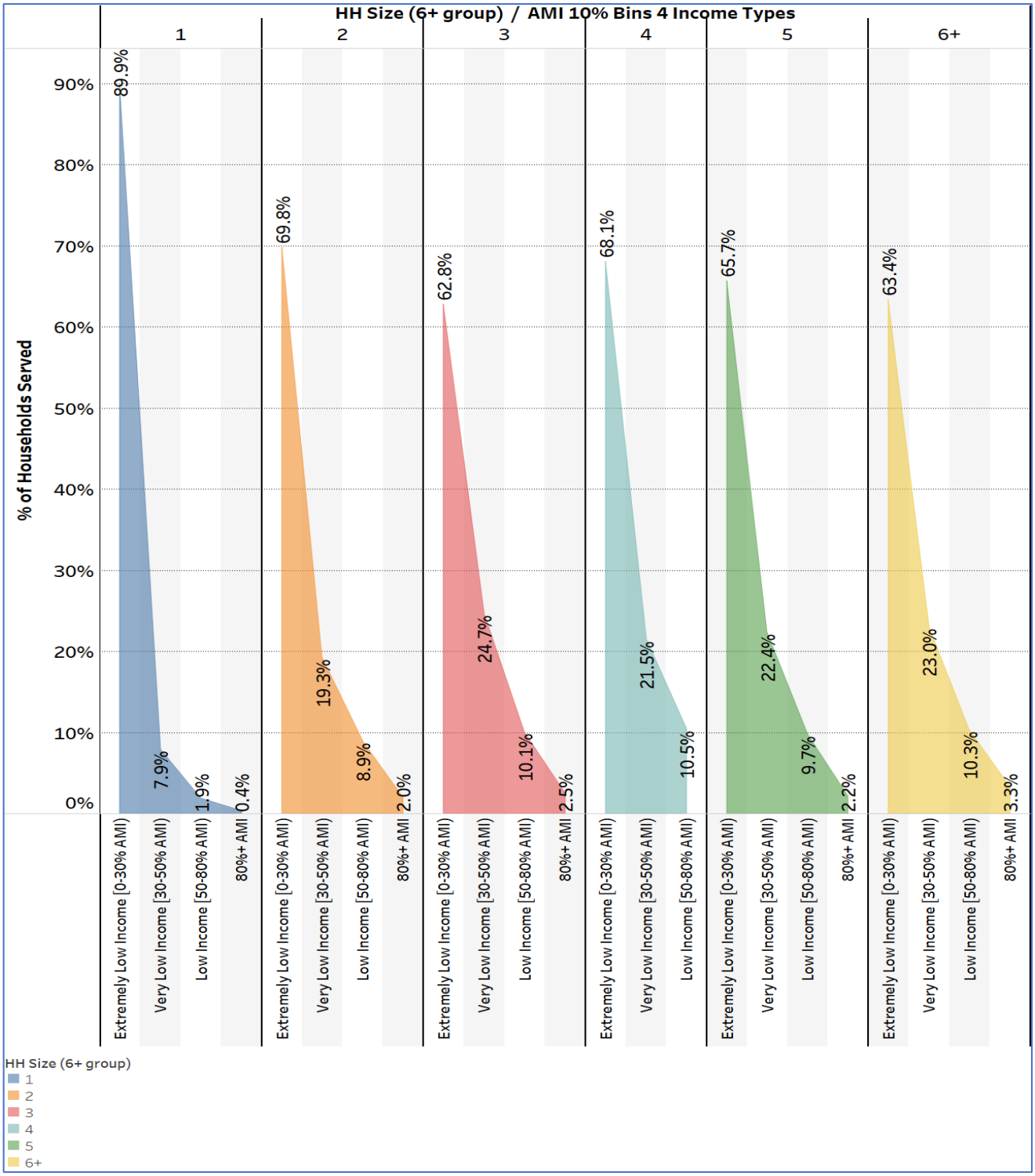


Figure 29. 2021 Low-Income Distribution by Household Size

Extremely/Very/Low-Income[7] distribution varied by Household size in 2021. **In 2021, 89.9% of single person households had %AMI in the Extremely Low-Income range, whereas larger household sizes tended to be slightly more evenly distributed.**



[7] **Extremely Low Income**: 0 to 30% (exclusive) AMI
Very Low Income: 30% (inclusive) to 50% (exclusive) AMI
Low Income: 50% (inclusive) to 80% (exclusive) AMI

Figure 30. 2021 %AMI Distribution by Gender of Head of Household

Household %AMI distribution varied with Head of Household Gender in 2021, with greater male than female representation in the 10-29% AMI ranges. Female representation at the 0-9% %AMI range was higher than male representation. Percentages shown are those by gender among all AMI ranges presented (all blue and orange bars separately add to 100%).

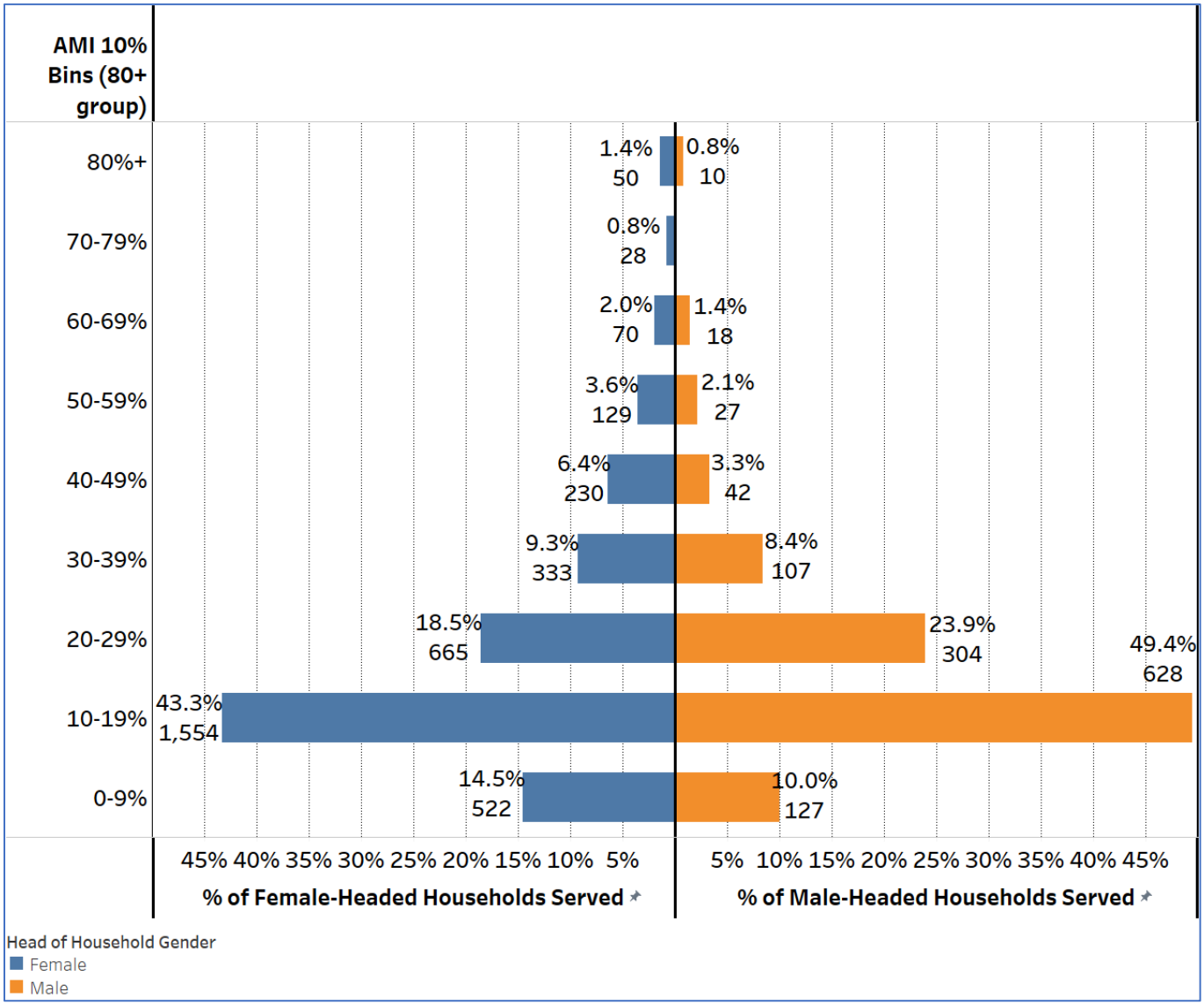
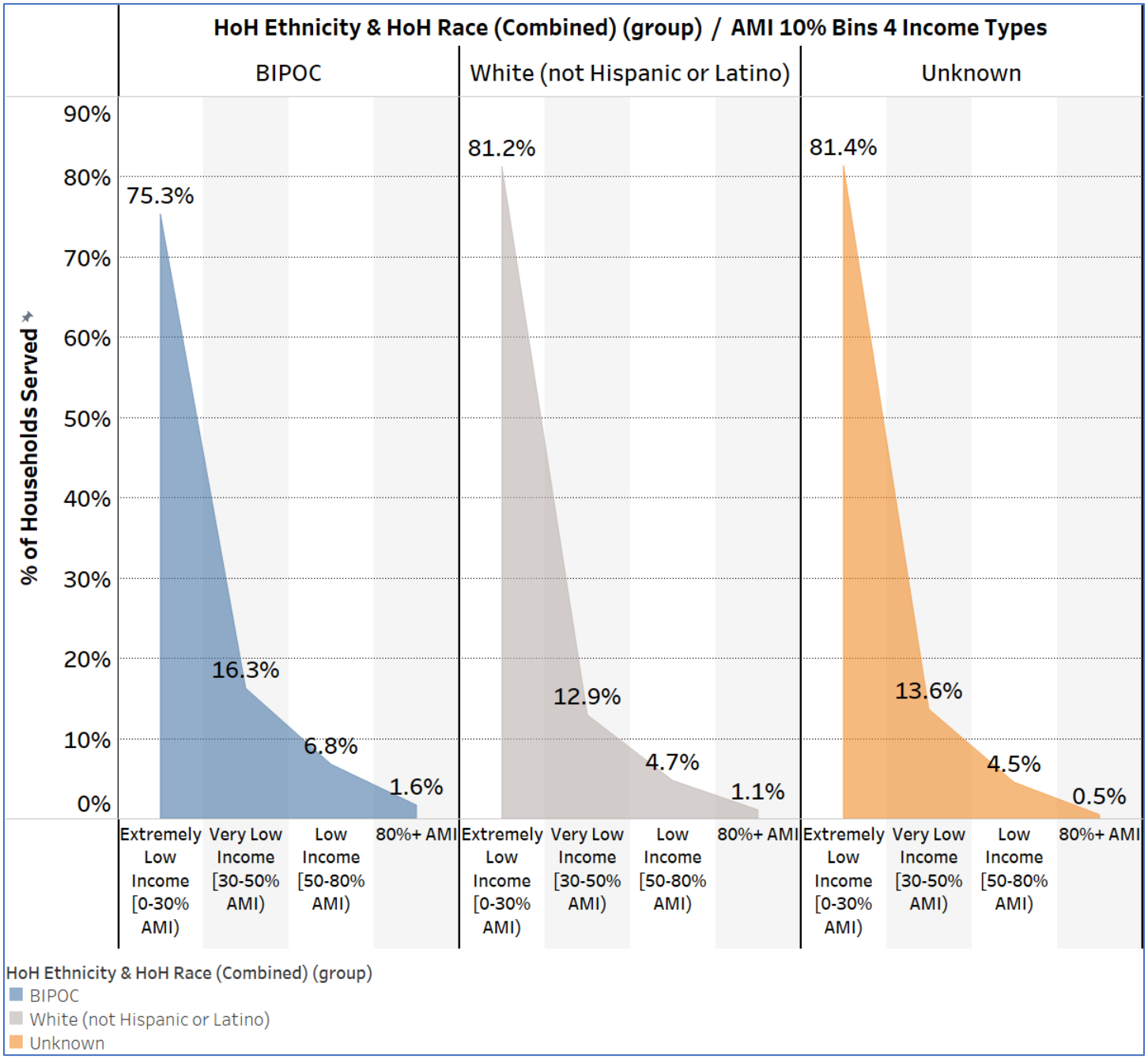


Figure 31. 2021 Low-Income Distribution by Race/Ethnicity of Head of Household

Extremely/Very/Low-Income distribution varied slightly by head of household self-reported Race/Ethnicity among households served in 2021. Households with Unknown head of household Race/Ethnicity had the highest proportion, 81.4%, in the Extremely Low-Income group [0-30% AMI), followed by White (not Hispanic or Latino) at 81.2%, and then BIPOC households at 73.0%.[8]



[8] Data has not been suppressed here due to larger category groupings of Race/Ethnicity and Income.

Figure 32. 2021 Low-Income Distribution by Race of Head of Household

Extremely/Very/Low-Income distribution varied slightly by head of household self-reported Race, among households served in 2021. Households with White head of households had the highest proportion, 80.5%, in the Extremely-Low Income group [0-30% AMI), while Native Hawaiian/Other Pacific Islander had the lowest, 64.3%.

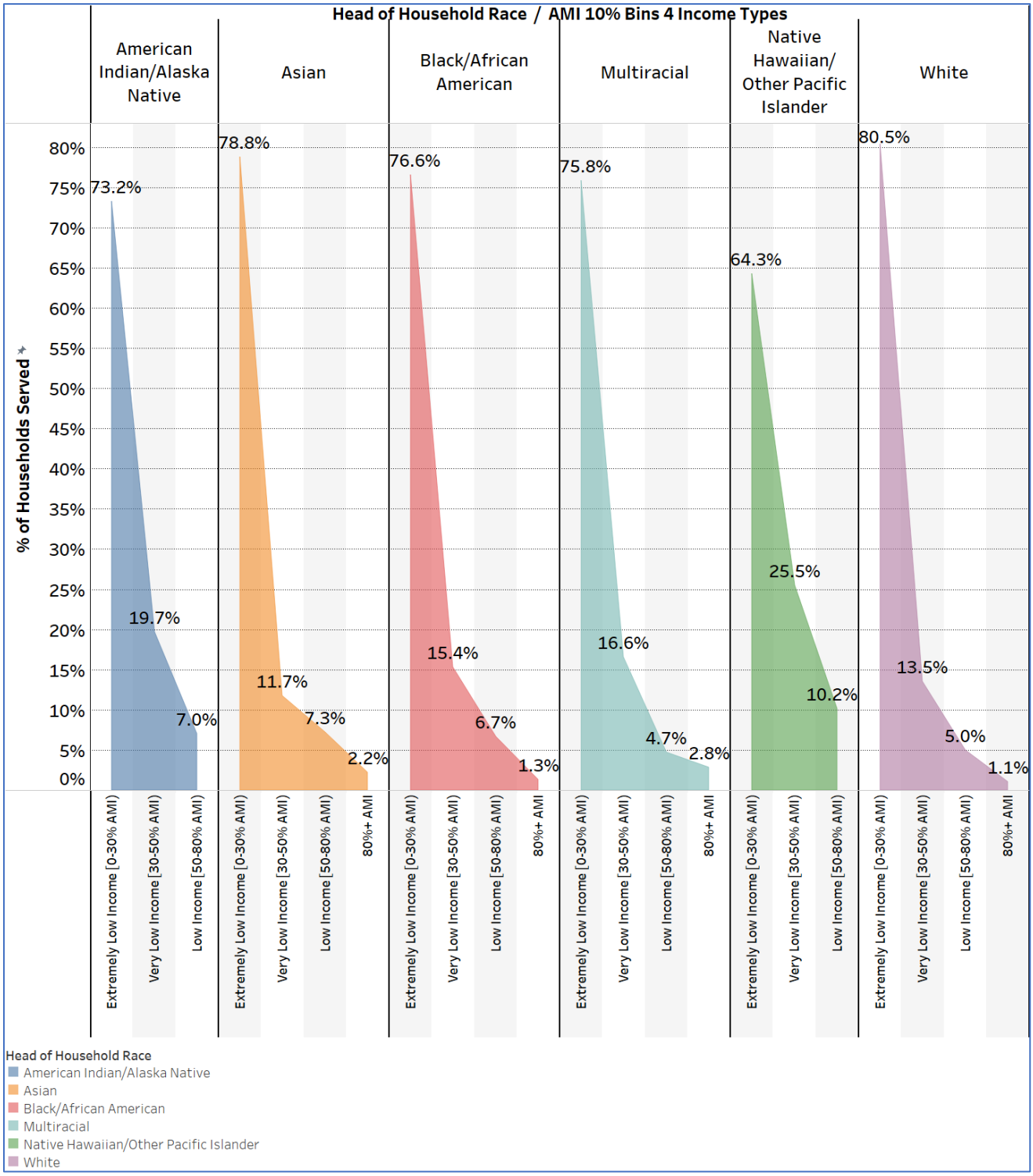


Figure 33. 2021 Low-Income Distribution by Household Disability Status

Household Extremely/Very/Low-Income distribution varied by Household Disability Status in 2021. **While both disabled and non-disabled households were most largely represented in the Extremely Low-Income band, non-disabled households had higher representation in all other ranges income bands compared to disabled households.**

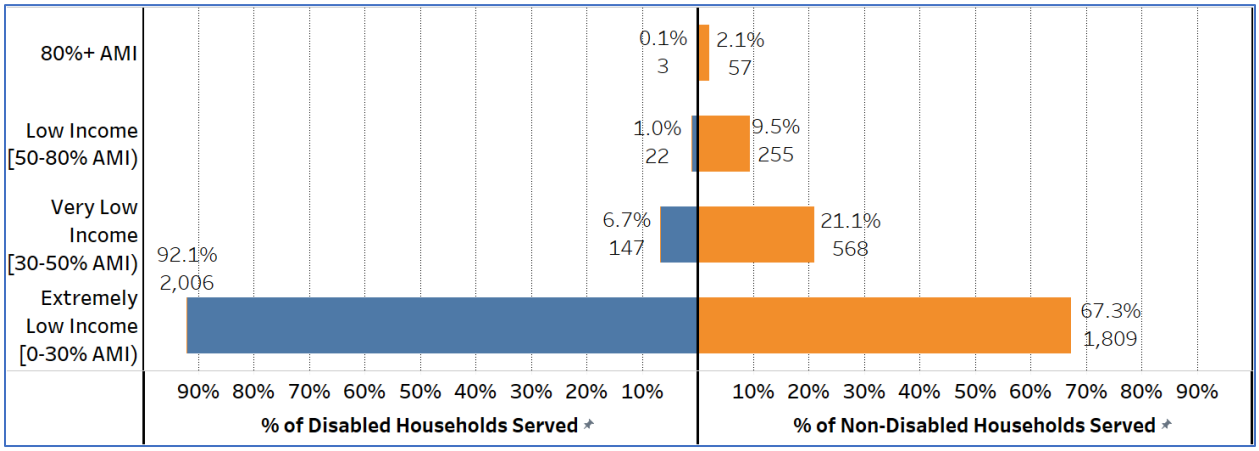
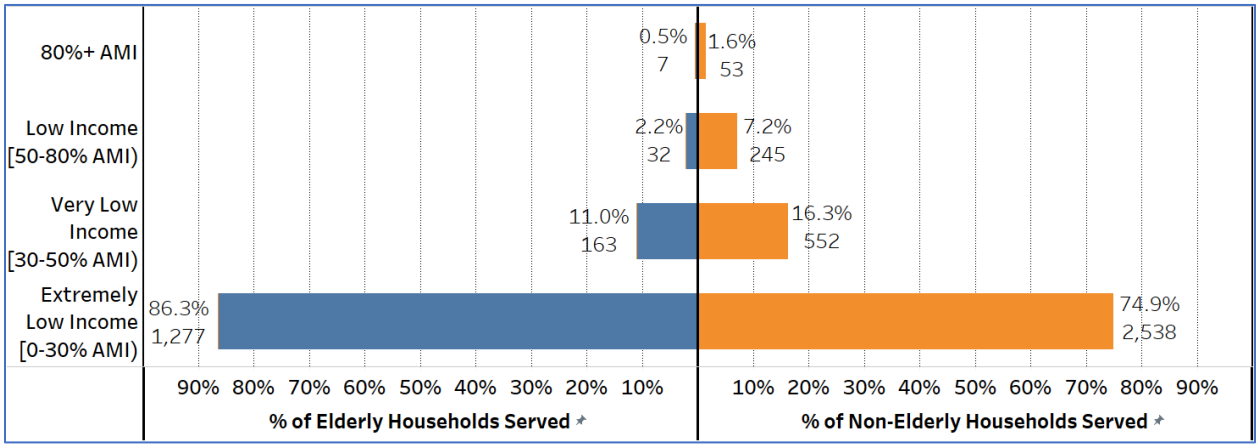


Figure 34. 2021 Low-Income Distribution by Household Elderly Status

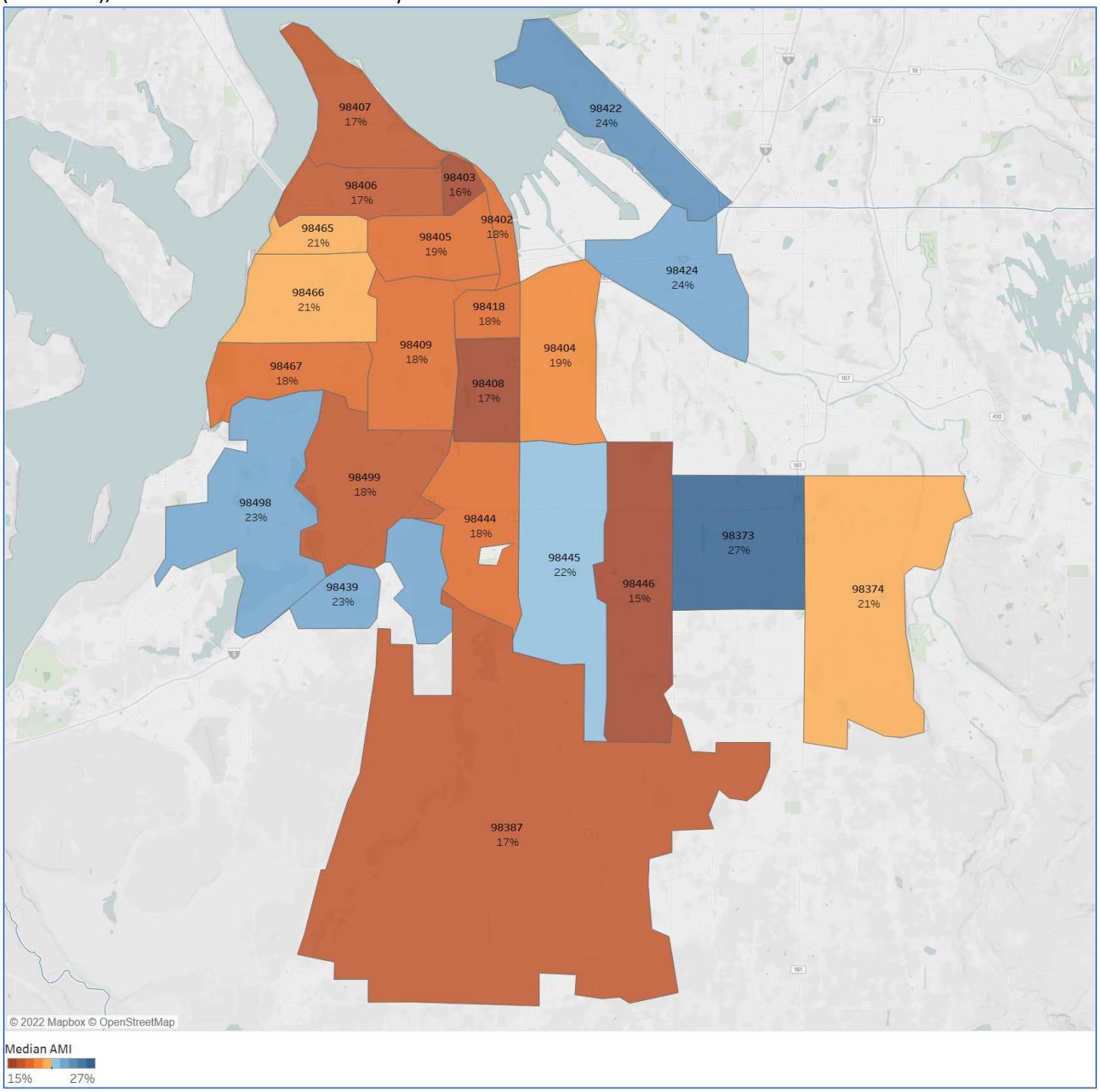
Household Extremely/Very/Low-Income distribution varied by Elderly (62+) Status in 2021. **While both elderly and non-elderly households were most largely represented in the Extremely Low-Income band, non-elderly households had higher representation in all other income bands compared with elderly.**



10. Median %AMI by ZIP Code

Figure 35. 2021 Tenant Based Voucher Median %AMI by ZIP Code

Variation in median %AMI among households in Tenant Based Voucher Programs in 2021 can be seen across Tacoma ZIP Codes.[9] **In this view, the ZIP codes with the highest (98373, 27%) and lowest (98446, 15%) median %AMI were contiguous and located in the southeastern region of Tacoma.** Median %AMI range shown: 15% (minimum) to 27% (maximum), which are both in the Extremely Low-Income band of 0-30% AMI.



[9] Maximum median AMIs represented with dark blue are not intended to communicate a state of wealth. Showing ZIP codes with at least 5 households.

11. Appendix

Figure A1. Area Median Income in Tacoma, 2019-2021

Tacoma Area Median Income depicted by year and household size (solid lines). Low Income groupings (Extremely/Very/Low-Income) and their relative values (bands shown as shaded regions) vary by year and household size. **Year-upon-year percentage AMI change shown for 2020 and 2021 by household size. AMI seemed to increase ~8% from 2019-2020 and ~5% from 2020-2021 across household sizes 1-8. The approach of representing household income as a percentage of yearly AMI controls for these variations, enabling improved comparison across years and household sizes.** *Source: Multifamily Tax Subsidy Income Limits, Office of Policy Development and Research* | U.S. *Department of Housing and Urban Development*. https://www.huduser.gov/portal/datasets/mtsp.html.

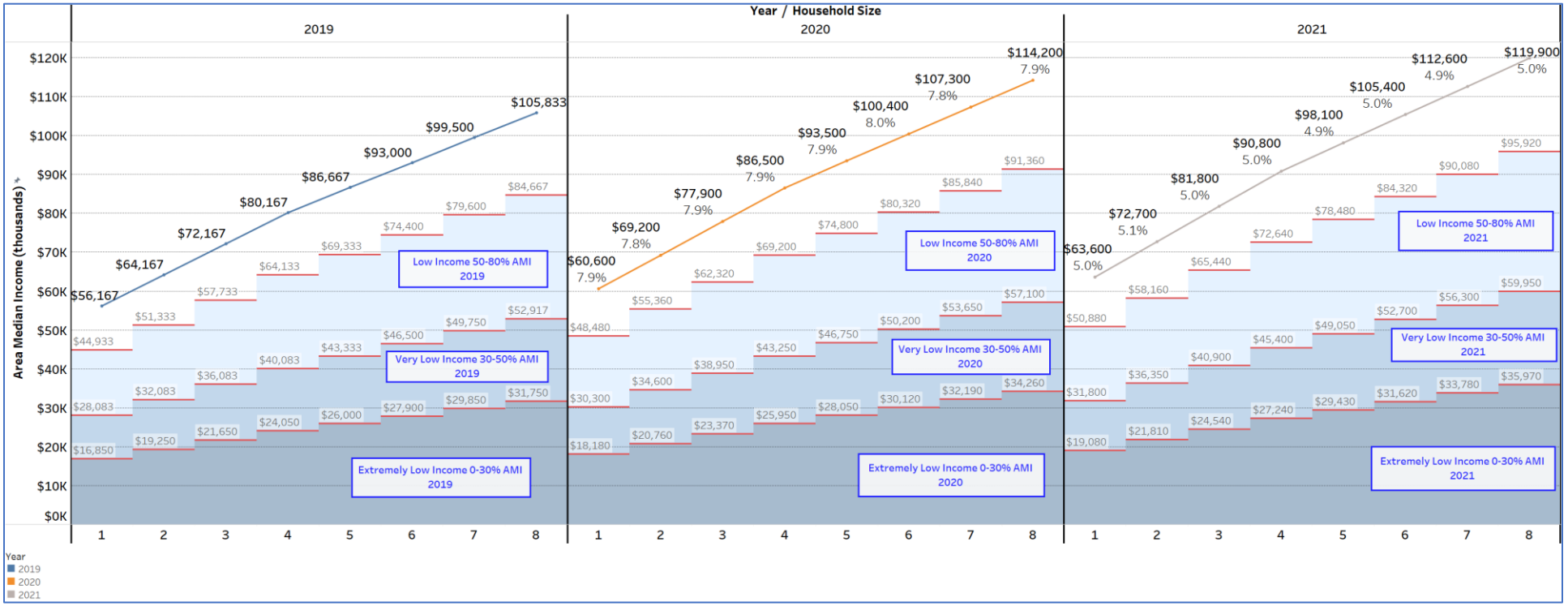


Figure A2. %AMI Distribution by Program and Yearly Trend, 2019-2021

3rd Party PBV Households (orange) had the largest representation in %AMI ranges 0-29% among all programs in years 2019-2021. From 2020 to 2021, the 3rd Party PBV Program saw a higher decrease in the 20-29% %AMI band compared with other programs, and a comparatively consistent representation in 30-39% %AMI from 2020-2021 while the other Programs (TBV and THA Portfolio) saw decreases in this range.

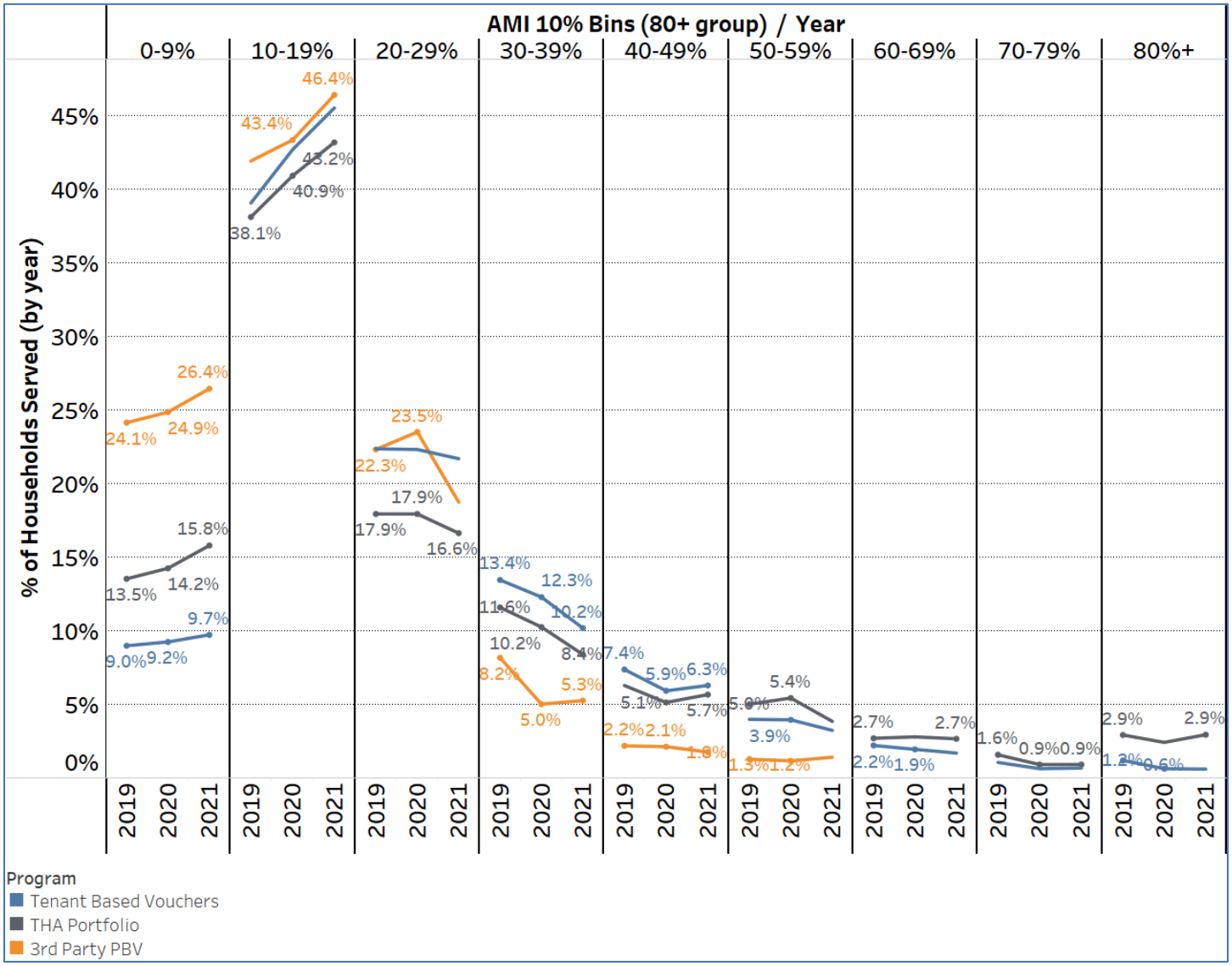


Figure A3. Median %AMI by Household Size and Program, 2019-2021

Disaggregating Median %AMI by Program (line colors) and household size depicts wide variation in median %AMI and change from 2019-2021. While 3rd Party PBV households tended to have the lowest median %AMI for all household sizes and years, yearly changes were less consistent across programs and household sizes.

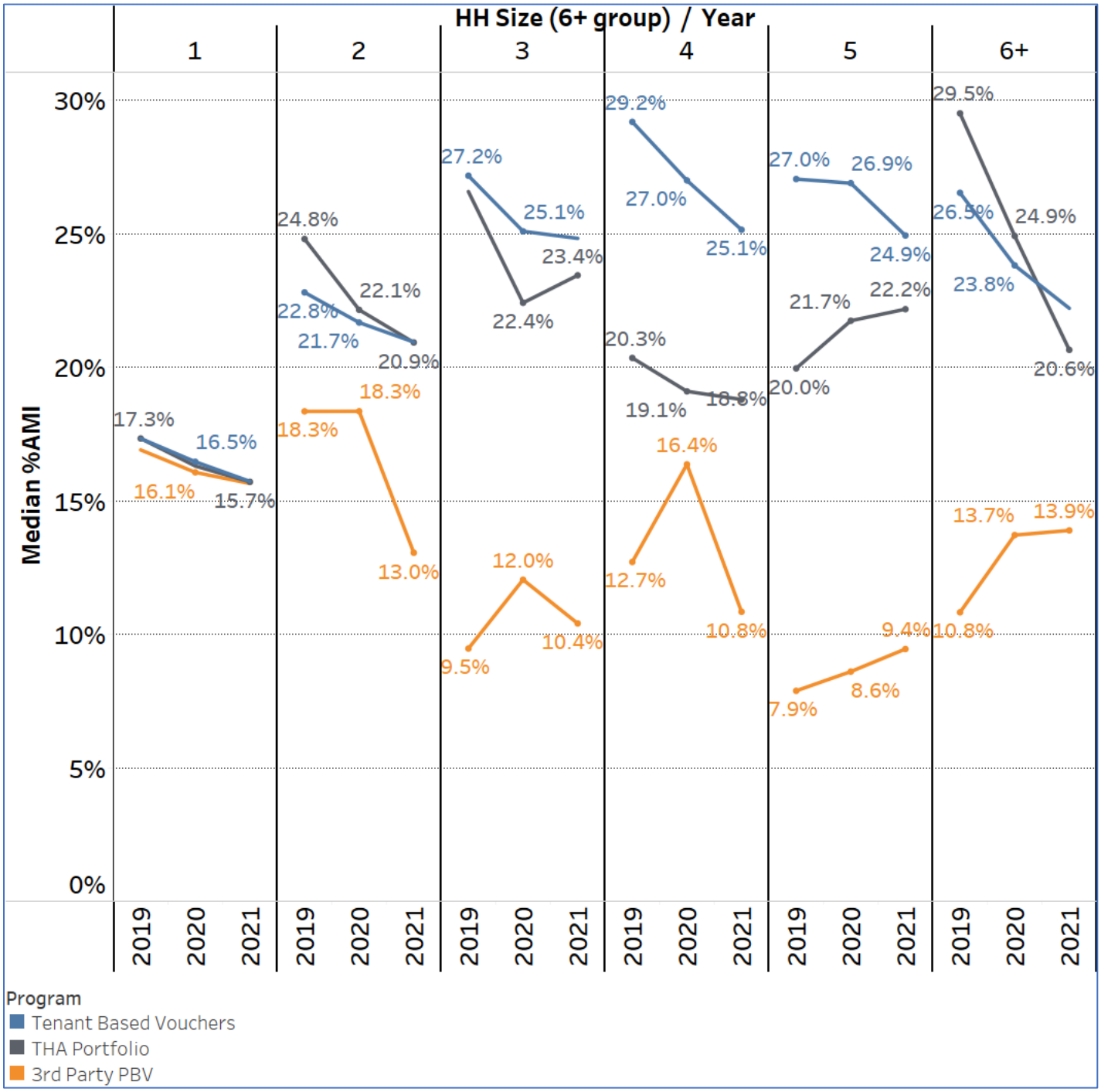


Figure A4. Median Household %AMI by Household Size and Head of Household Gender, 2019-2021

Household Median %AMI varied by Head of Household Gender and Household Size from 2019-2021. For example, from 2019-2021, 5-person households headed by males saw large decreases in median %AMI (38.4% to 28.0%) while female households saw comparatively minor change (23.0% to 21.9%).

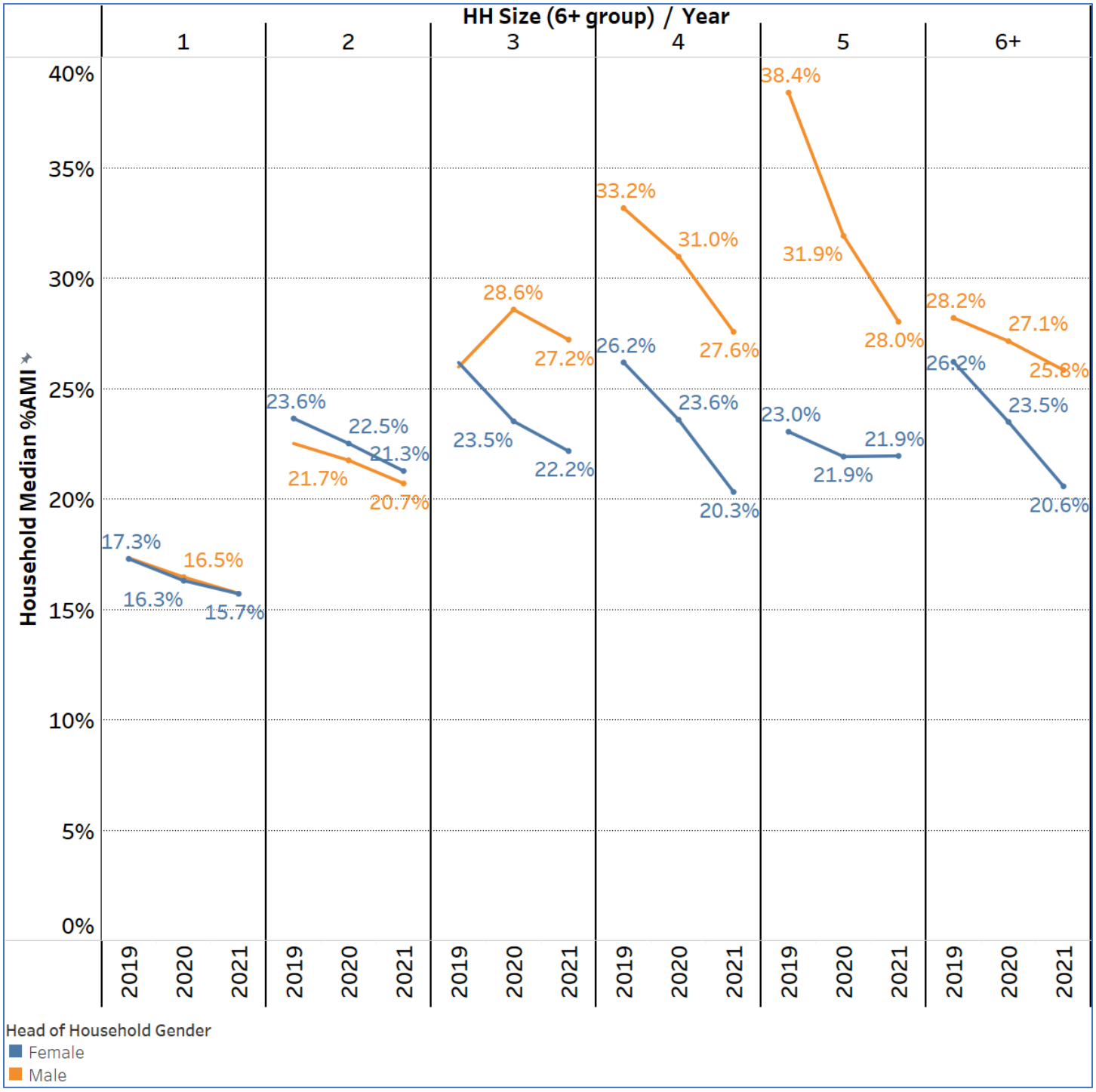


Figure A5. Median %AMI by Household Size and Head of Household Race/Ethnicity, 2019-2021

Household Median varied by Head of Household Race/Ethnicity and Household Size from 2019-2021. For example, BIPOC and White (not Hispanic or Latino) households with 4 individuals saw overall decreases in %AMI from 2019-2021, while Unknown households of the same size saw an overall increase in %AMI, closing the gap between the group. The gap between unknown and known head of household race/ethnicity %AMI change between 2019-2021 was generally widened for households with 3 individuals by contrast, largely driven by sharper decreases for households of unknown race/ethnicity.

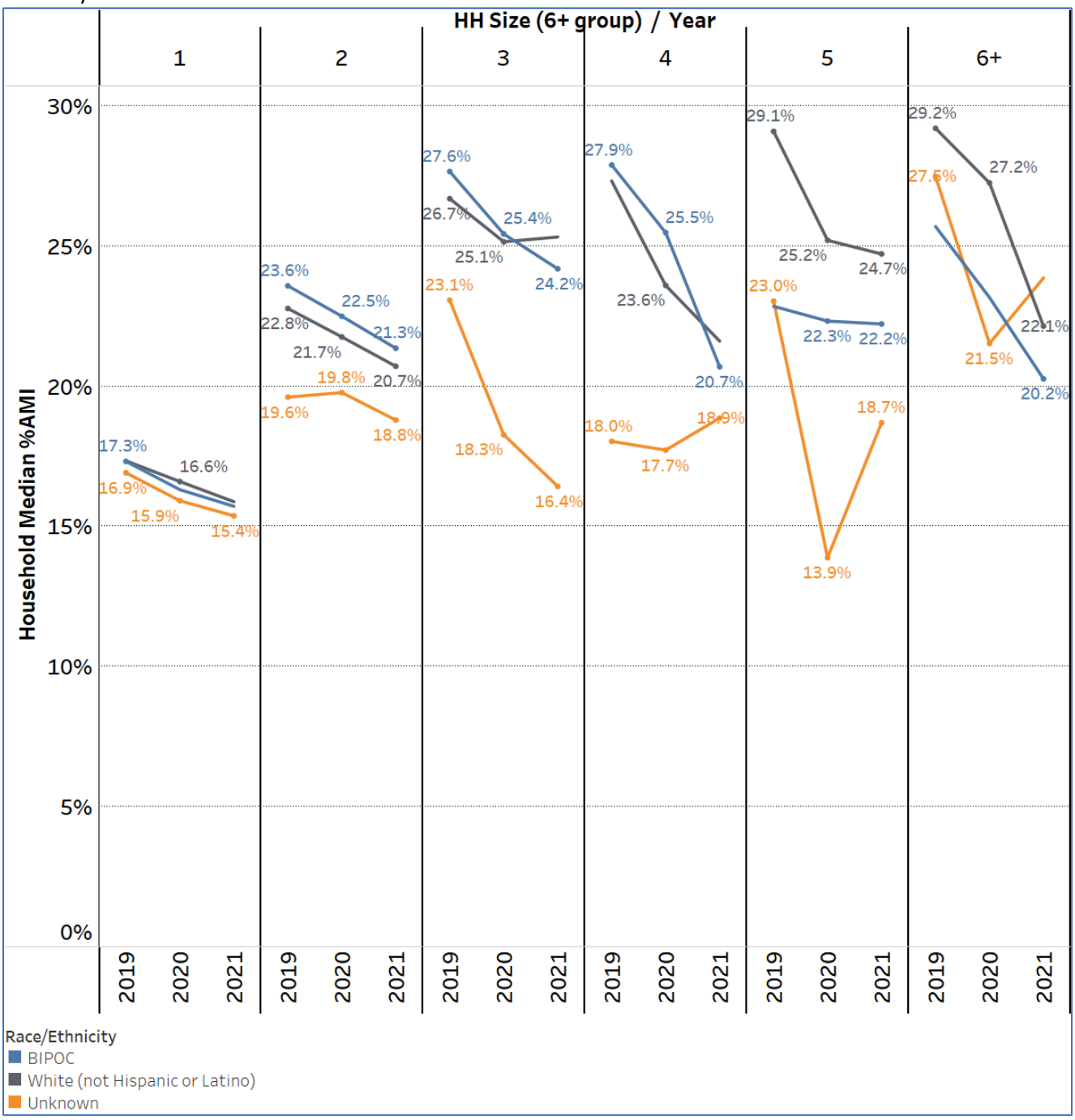


Figure A6. 2021 %AMI Distribution by Household Size and Number of Adults in Household (1 vs 2+)

%AMI distribution varied by Household size and number of adults in the household in 2021. **Generally, larger household sizes had larger distributions in higher %AMIs ranges comparing households with 2+ adults to those with only 1 adult in the household in 2021.**

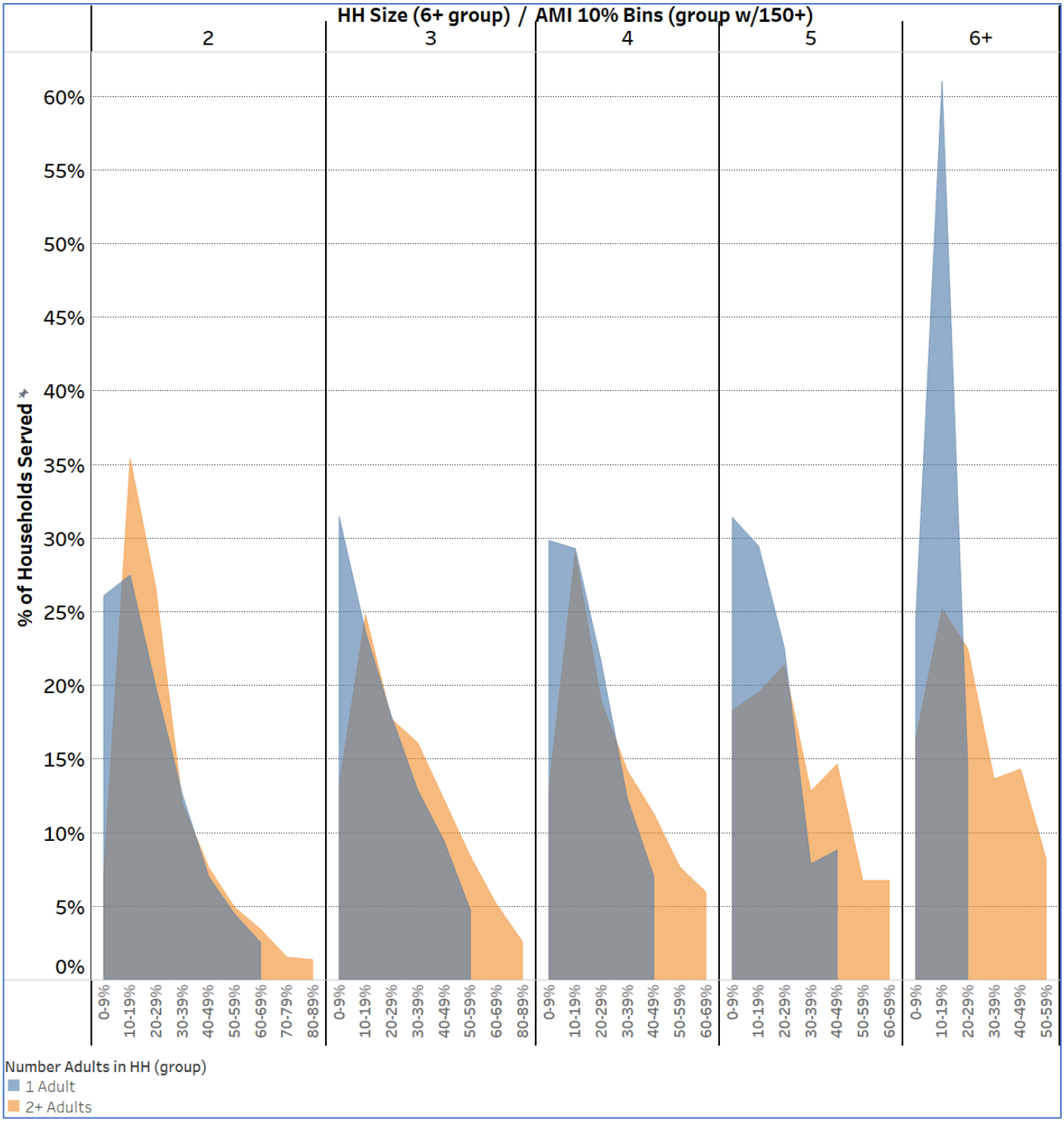


Figure A7. 2021 %AMI by Number of Children, Head of Household Gender, and Number of Adults

In 2021, households with 1 adult (left pane) had lower Household Median %AMIs than households with 2 or more adults (right pane) for all counts of children (x-axis) in the household. Of note, it appears that %AMI generally decreased with increasing number of children. Comparing households with 1 child to no children, every demographic combination (head of household gender, number of adults) had higher %AMI except for Female-headed households with 2 or more adults. Other slight differences can be seen between households with Male or Female Head of Households.

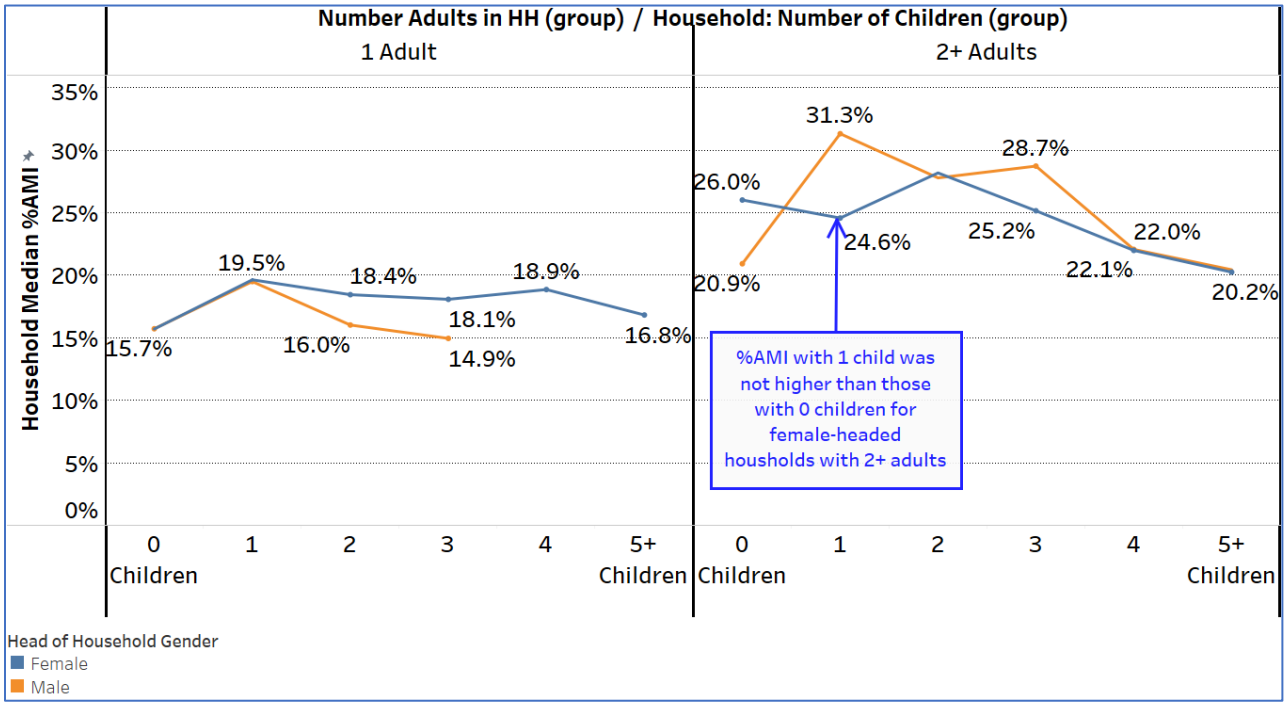
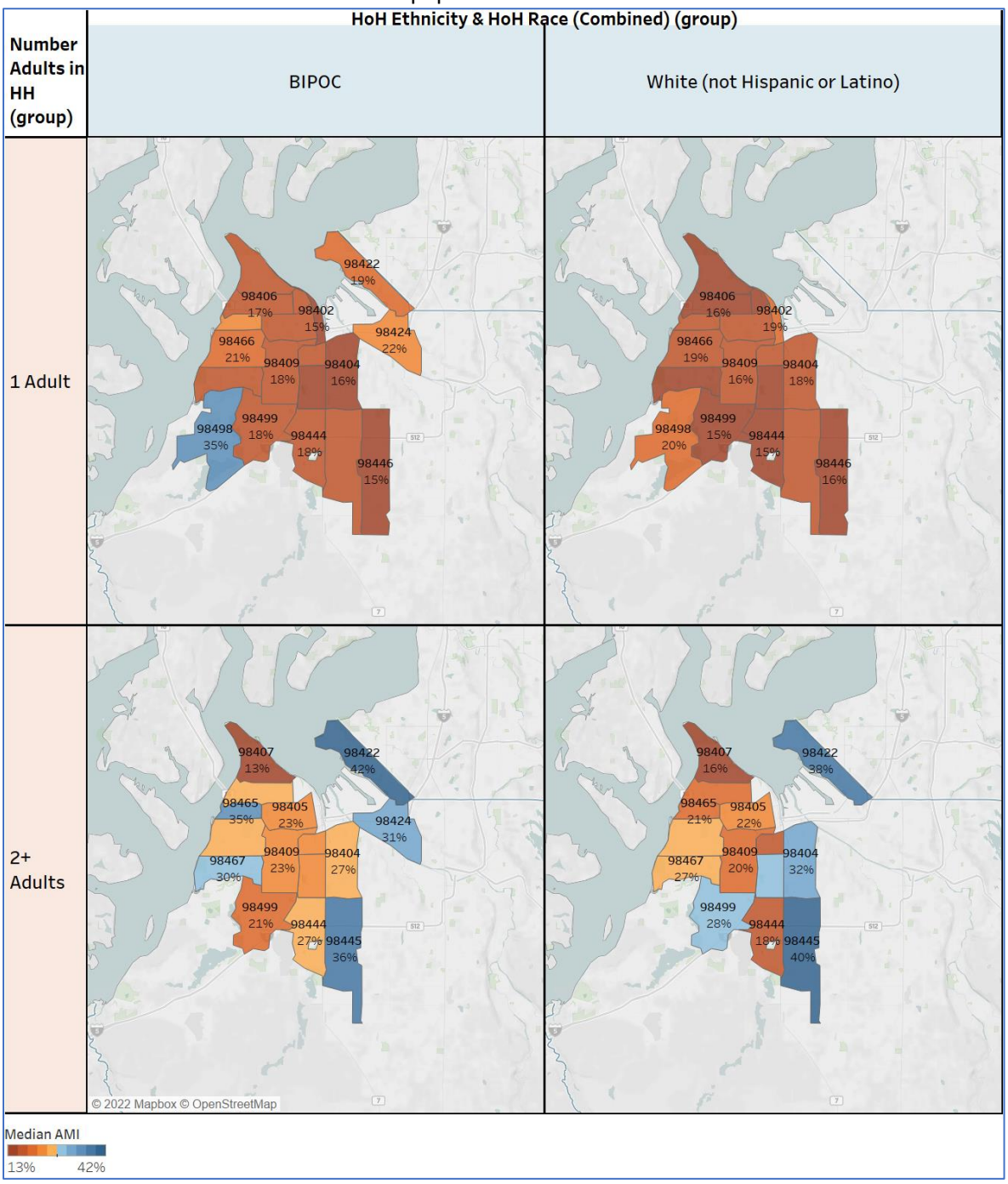


Figure A8. 2021 Tenant Based Voucher Median %AMI by ZIP Code, Number of Adults, and Race/Ethnicity

As additional demographics are brought into view, variation can be seen between and among groups across ZIP codes in the region, including presence or absence of groups represented, and their corresponding median %AMI. For instance, 1-adult households were represented in ZIP code 98446 (southeast Tacoma), whereas 2+-adult households were not represented. In some outer Tacoma ZIP codes such as 98422 (northeast Tacoma) and 98445 (southeast Tacoma), 2+-adult households also tended to have higher %AMIs than 1-adult households and seemed to be the areas with highest %AMI households within the 2+-adult population of households.[10]

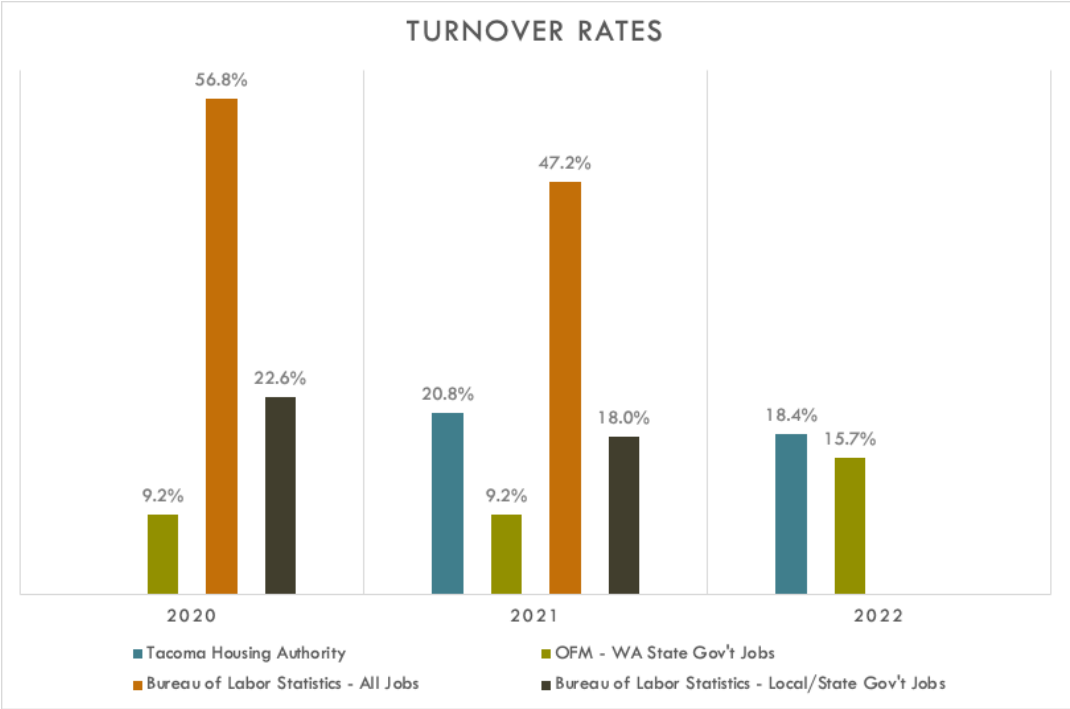


[10] Maximum median AMIs represented with dark blue are not intended to communicate a state of wealth. Showing ZIP codes with at least 5 households.

THA Staff Turnover Data

From January 2022 to present, THA has hired 34 new staff members excluding agency temporary staff. There have been 29 separations with six of these leaving due to the vaccine mandate and four retirements. This results in a turnover rate of 18.35%. The turnover rate is calculated taking the number of separations divided by average number of employees. Using the average number of employees for the year 2022, the turnover rate is calculated as 29/158.

The following graphs display the THA turnover rates against National and State Data.



Key takeaway:

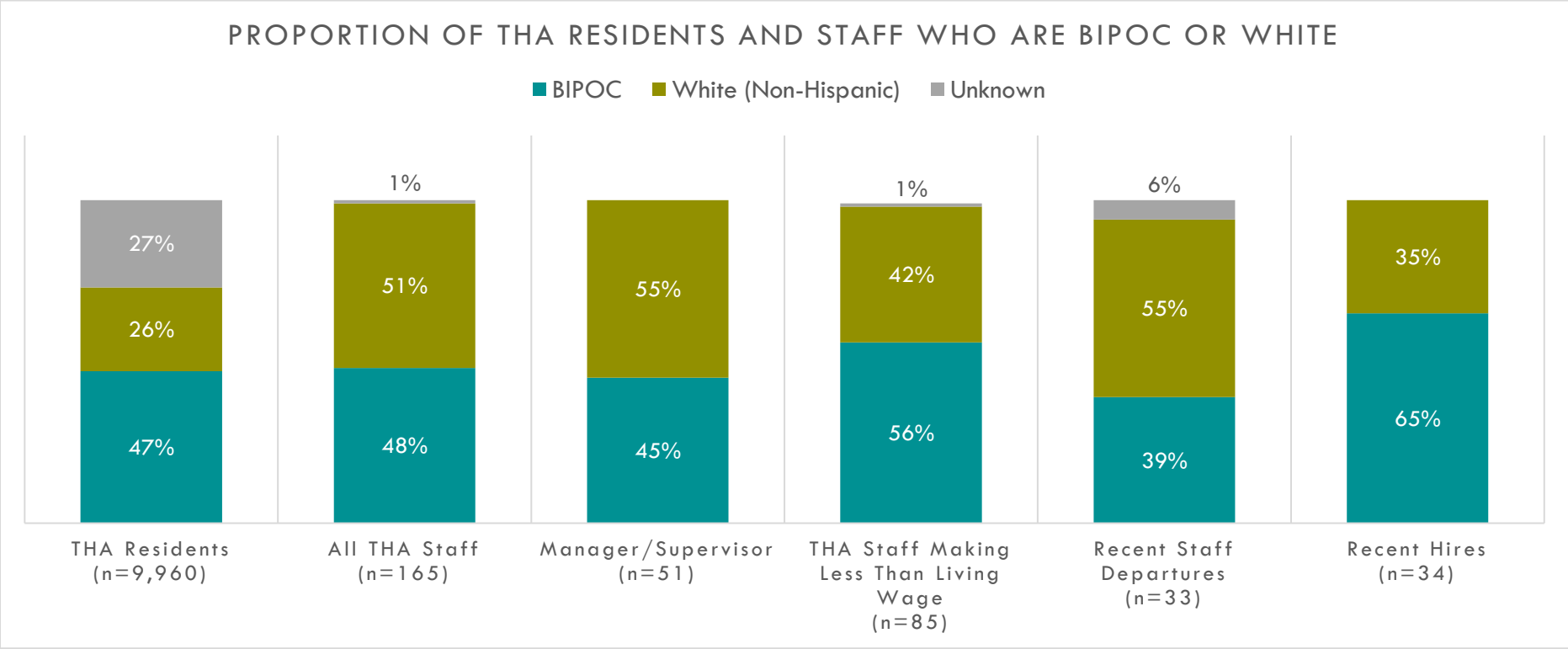
- THA's turnover rate is similar to that of other employers for the past two years. While these turnover rates are considered "normal," THA will continue to focus on implementing retention measures to make THA a more attractive place to work, grow, and retire.

THA Staff Demographics

The following graphs display the proportion of THA staff that fall into various demographic categories. All current THA residents (regardless of age or head of household status) are used as a comparison to reflect upon how representative THA staff is to our resident population.

Additionally, staff data is further broken out to explore if there any demographic group(s) are disproportionately represented amongst staff making less than a living wage (living wage = $32/hr), recent staff departures, and recent staff hires.

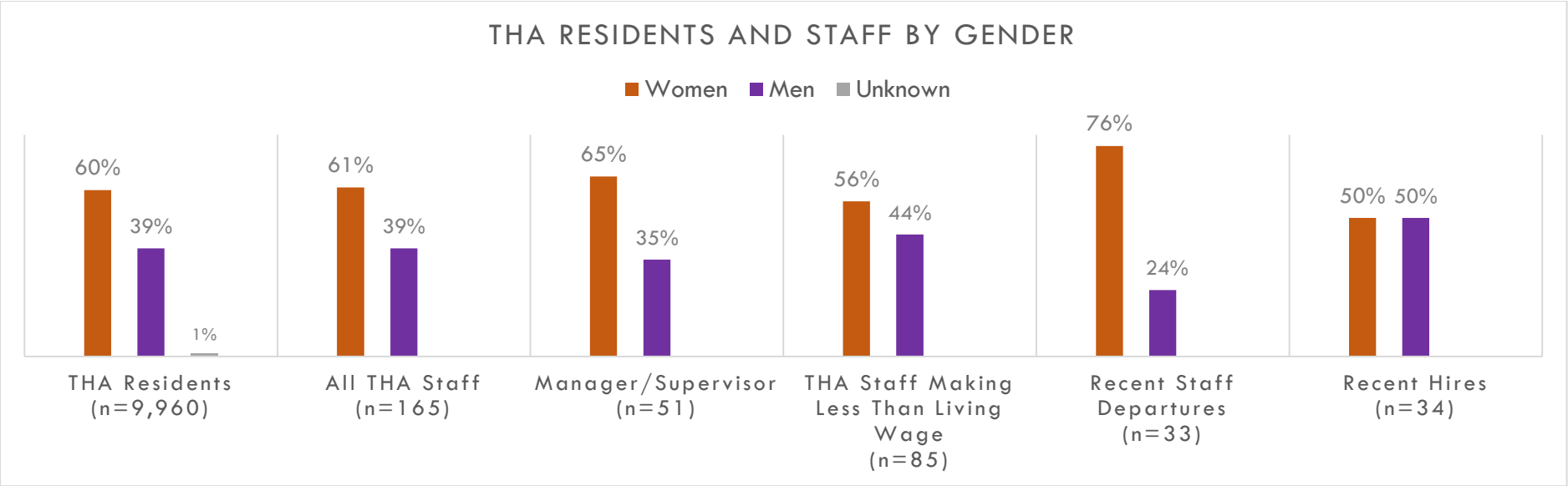
Section 1: Proportion of THA Residents and Staff who are BIPOC or White



Key observations:

- Direct comparisons are somewhat difficult given we do not have demographic data on roughly 25% of our residents/voucher clients.
- In comparison to the THA resident population, white people are overrepresented among THA staff. However, they are also overrepresented when looking at recent departures and underrepresented when looking at recent hires. This may suggest that we are experiencing a shift in our staff demographics as we see greater diversity among new staff joining THA.
- When it comes to the proportion of staff earning less than a living wage, BIPOC staff are overrepresented. Though almost half (48%) of THA staff identifies as BIPOC, over half (56%) earn below a living wage.

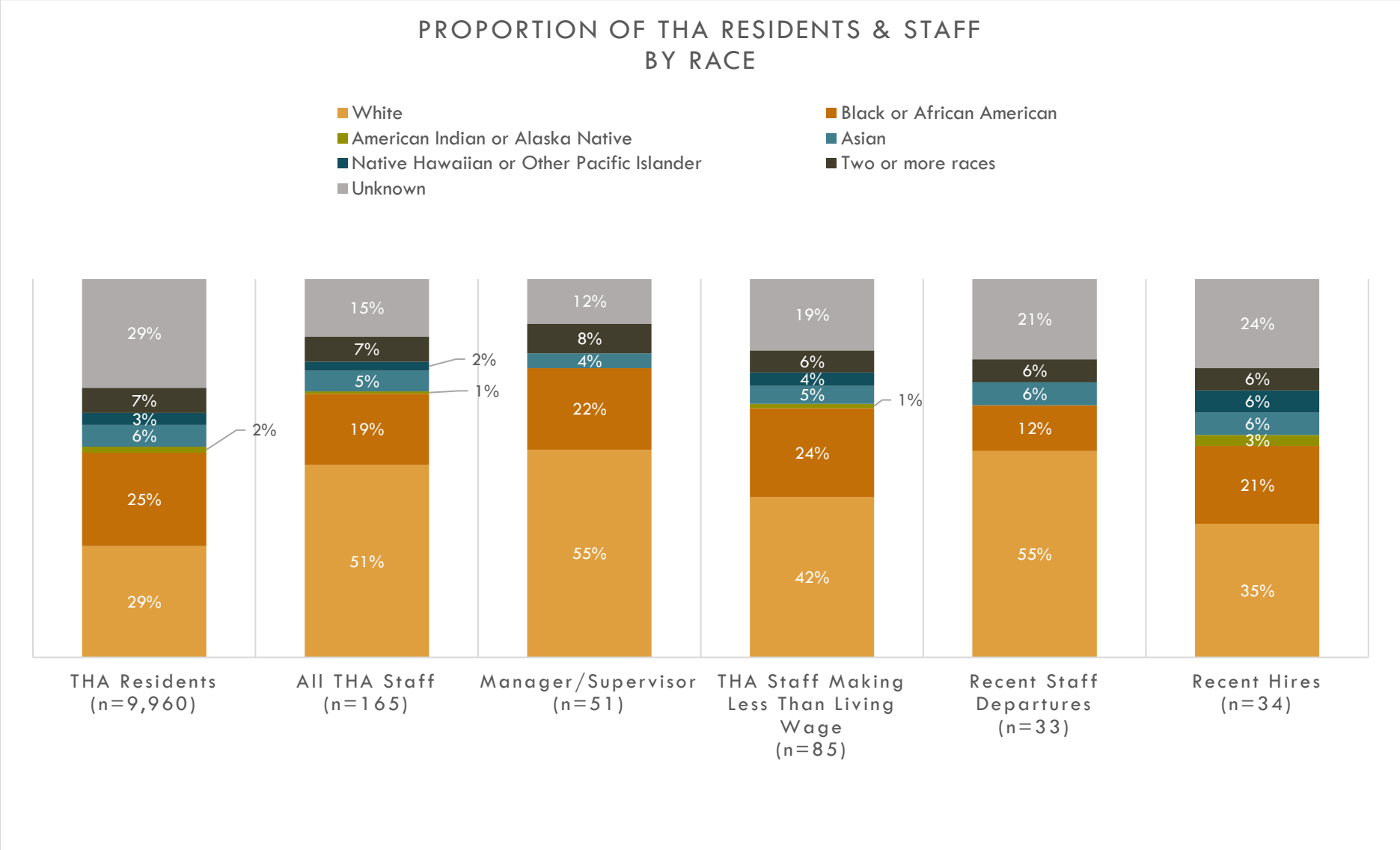
Section 2: THA Residents and Staff by Gender

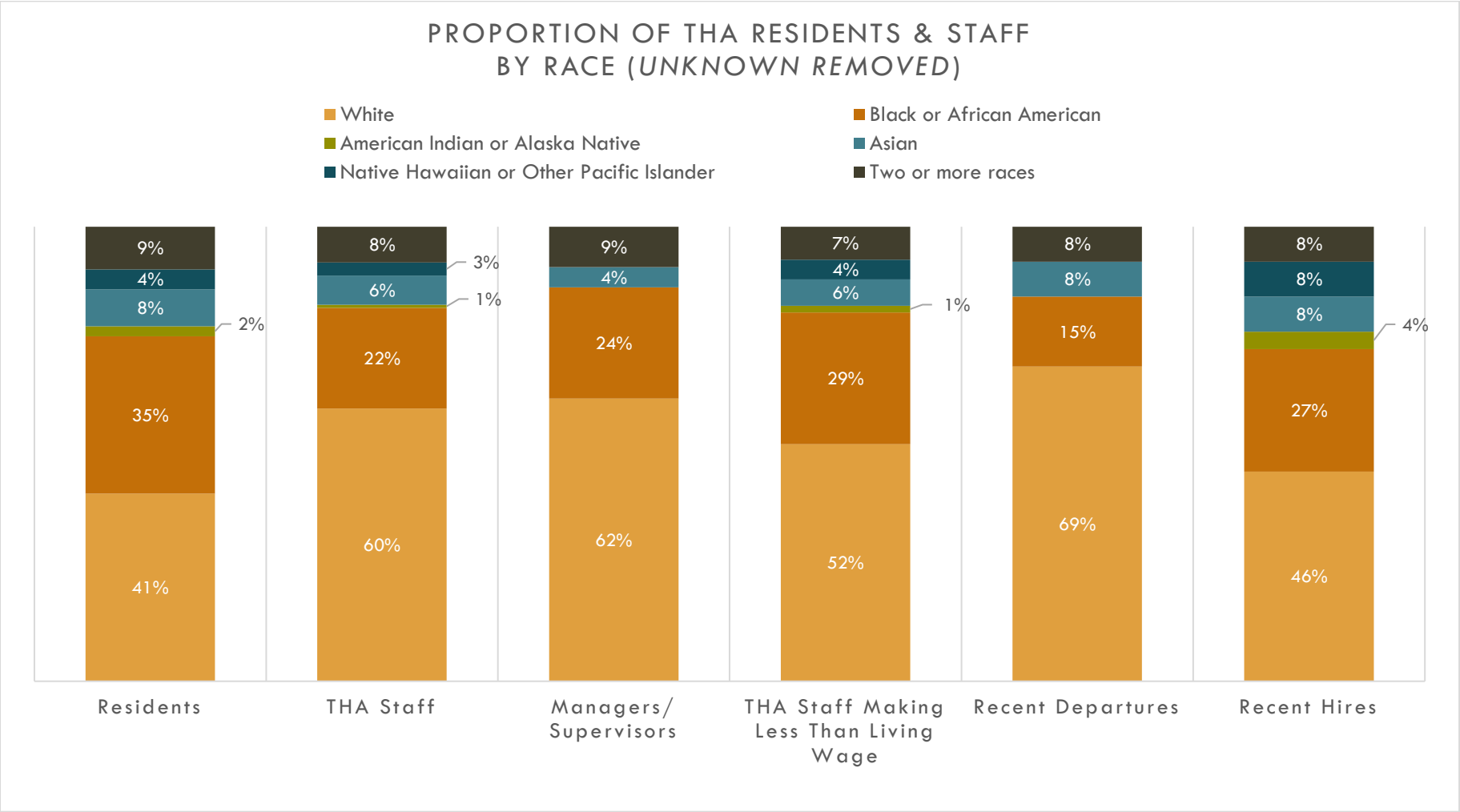


Key observations:

- THA staff is representative of our resident/client population when it comes to gender.
- Men are overrepresented in those making less than a living wage.
- Women are overrepresented in those staff who have recently departed THA.

Section 3: THA Residents and Staff by Race

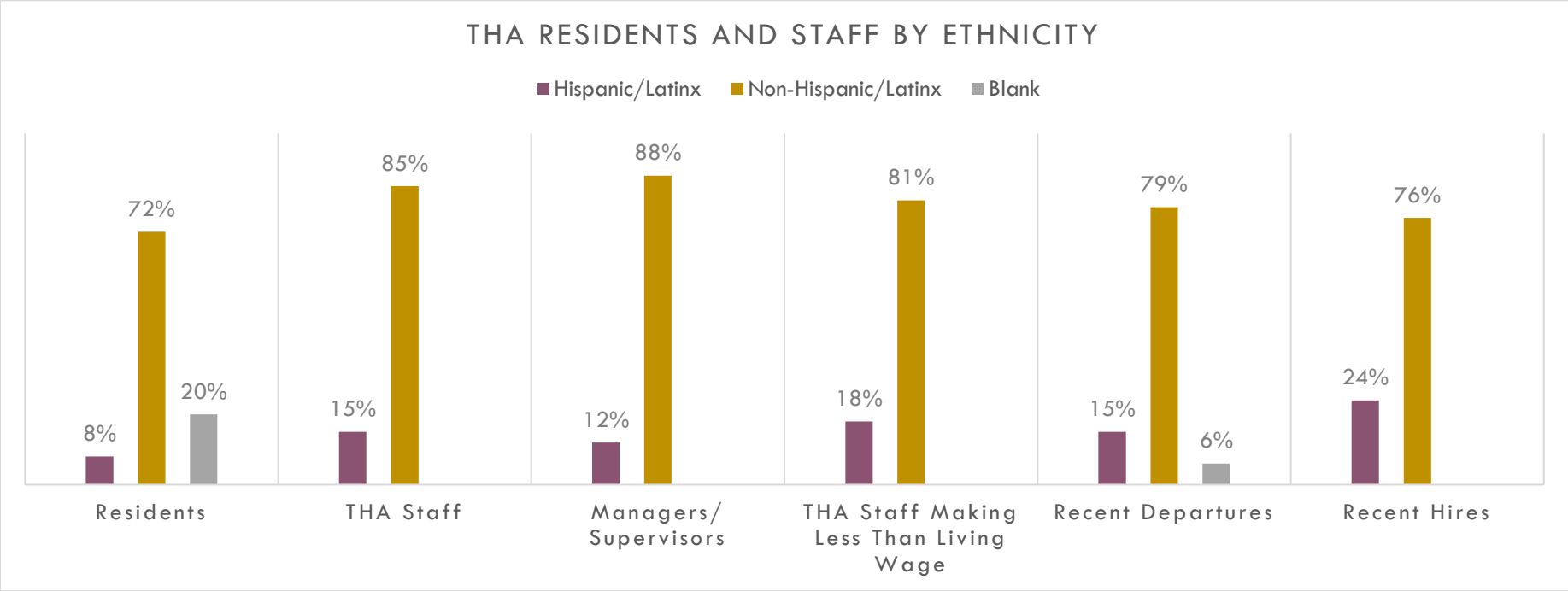




Key observations:

- Regardless of whether residents and staff whose race is unknown are included in the analysis, there is an overrepresentation of white staff and white staff in manager/supervisor positions when compared to the THA resident and voucher holder population.
- However, white staff make up over half of those staff who have recently departed.
- THA is making some gains in hiring more staff who are Black/African American, American Indian/Alaska Native, and Native Hawaiian or Other Pacific Islander.

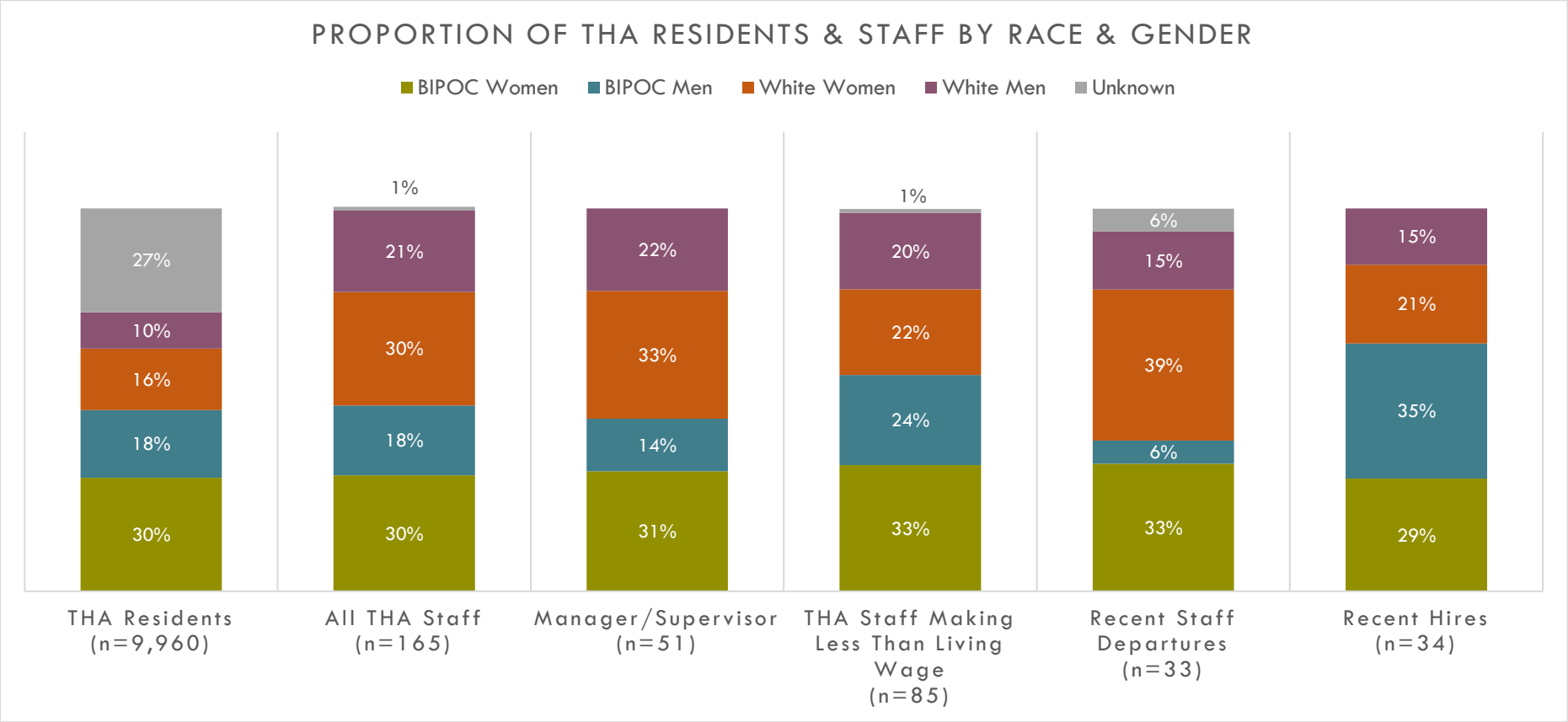
Section 4: Proportion of THA Residents and Staff by Ethnicity

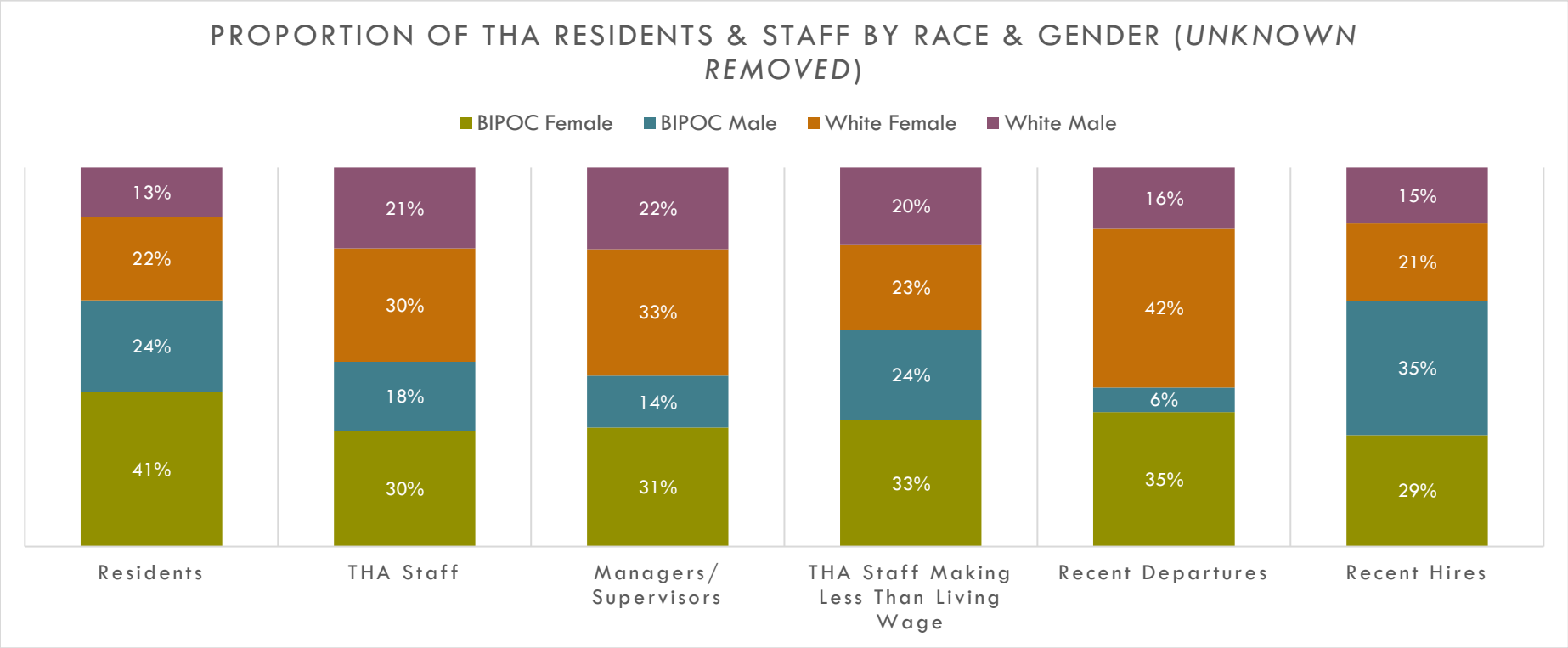


Key Observations:

- There is greater representation of Hispanic/Latinx among THA staff, particularly recent hires, than the THA resident population. (When incomplete data is removed, 10% of THA's client population identifies as Hispanic/Latinx.)

Section 5: Proportion of THA Residents and Staff by Race, Ethnicity, and Gender





Key Observations:

- When looking at race, ethnicity, and gender combined, we see that representation of white men and women is nearly double the proportion of white THA residents/voucher household members. When people whose race and gender are marked 'unknown' are removed, the proportion of staff who are white are no longer double that of the resident population, but an overrepresentation remains.
- While white women are underrepresented in staff making below a living wage, they are the greatest proportion of staff who have recently departed.

Tacoma Housing Authority

tacomahousing.org/arlingtondrive

ARLINGTON DRIVE YOUTH CAMPUS

A safe and supportive home for young adults experiencing homelessness.

INTRODUCTION

In 2016, at least 1,070 youth and young adults in Pierce County were homeless. In 2019, the Tacoma Housing Authority (THA) sought to tackle this crisis head-on by building the largest housing model for youth and young adults in Washington State. The goal of Arlington Drive Youth Campus is to provide young people experiencing homelessness with stability and safety while supporting them towards successful life transitions without exploitation, impoverishment, and fear.

AT A GLANCE

Youth and Young Adults Served Since October 2020

- THA housed 71 young adults (ages 18-24) in apartments. To date, THA has supplemented the rent of Arlington residents to the tune of $1,040,113.
- CYS provided emergency shelter, case management, and successful transitions to 114 youth (ages 12- 17), preventing homelessness.

"[Living at] Arlington has done so much for me and my daughter. I have a chance to figure things out and actually feel safe."

Current Resident and Single Mother

Age 23

SUMMARY

Since the Tacoma Housing Authority began leasing apartments at Arlington Drive Youth Campus in Q4 of 2020, the project has seen a 91% success rate in discharging youth to stable housing, and has diverted over 1,093 youth and young adults away from homelessness in Pierce County.

SUPPORT & PARTNERSHIPS

The Tacoma Housing Authority partners with Community Youth Services (CYS) and the YMCA of Greater Seattle's Social Impact Center to provide supportive services to residents of Arlington Drive.

- THA owns and operates the 58-unit Arlington Apartments for homeless young adults ages 18-24
- CYS manages the on-site 12-bed Crisis Residential Center (CRC/HOPE), providing temporary shelter, permanency planning, and family reconciliation services for homeless youth without families, ages 12 to 17.
- The YMCA of Greater Seattle's Social Impact Center provides case management services, mental health support, substance use disorder counseling, and life skills training for Arlington residents.

RECOMMENDATIONS

Sustain funds in state fiscal year 2024

The Office of Homeless Youth recommends that the Legislature continue to fund this innovative and proven program at $4.25 million per biennium in state general funds. This funding is vital to ensure Arlington Drive will continue to maintain housing and supportive services for youth and young adults who lack a safe and stable place to stay.

Make funding expenditures flexible through account deposit

The Legislature appropriated $4.25 million in state general funds in the 2021-23 biennium to provide youth and young adult housing and supportive services in Tacoma. Any funds left unspent after the 2023 fiscal year will be lost. The Office of Homeless Youth and partners recommend funds should be deposited into Fund 10B - Home Security Account for dedicated use. Funding this project through 10B would allow any unspent dollars contracted for this project to remain available for the entirety of the biennium. This flexibility is critical to ensure that these funds are not wasted; and each dollar spent will go further to support and house vulnerable youth and young adults facing homelessness.

TACOMA HOUSING AUTHORITY

FINANCE

TACOMA HOUSING AUTHORITY

Motion

Adopt a consent motion ratifying the payment of cash disbursements totaling $7,537,048 for the month of August 2022.

Approved: September 28, 2022

_____

Shennetta Smith, Chair

TACOMA HOUSING AUTHORITY
Cash Disbursements for the month of August 2022

		Check Numbers From		To	Amount	Totals
A/P Checking Accounts						
Accounts Payable Checks	Check #'s	**95,877**	-	**95,973**		
Accounts Payable ACHs	ACHs	**1,349**	-	**1,404**		
Business Support Center					1,108,801	Program Support
Moving To Work Support Center					136,919	
Moving To Work Buildings (used by Support Center)					38,612	
Tax Credit Program Support Center					42,252	
Section 8 Programs					348,372	Section 8 Operations
Arlington Crisis Residential Center					4,724	Properties
KeyBank Building					1,591	
Salishan 7					13,220	
Education Program - THDG					12,003	THDG
THDG - General					6,780	
Saravida Building					1,806	Development
James Center					1,933	
Housing Hilltop LLLP					824	
Bus Development Activity					143	
Department of Commerce Funding for Crisis Residential Center					257,368	Client Support
Community Services MTW Fund					7,408	
Education Private Grants (Gates, etc.)					13,566	
Education-Local Gov't Grants (County, City)					7,000	
AMP 6 - Scattered Sites					331	Public Housing
AMP 9 - HT 1500 - Subsidy					665	
THA SUBTOTAL					2,004,316	
Hillside Terrace 2 & 1500					6,559	Tax Credit Projects - Reimbursable
Bay Terrace I & II & Community Facility					7,396	
Housing Hilltop LLLP					532,252	
Arlington Youth Campus					3,019	
Court F (The Rise)					3,193	
Renew Tacoma Housing					21,774	
Salishan 1 - Salishan 6					10,196	
TAX CREDIT SUBTOTAL (Operations & Development - billable)					584,391	**2,588,706**
Section 8 Checking Account (HAP Payments)						
SRO/HCV/VASH/FUP/NED	Check #'s	**485,957**	-	**486,068**	212,948	
	ACHs	**21,901**	-	**22,821**	3,710,148	**$ 3,923,096**
Payroll & Payroll Fees - ADP						**$ 1,025,246**
TOTAL DISBURSEMENTS						**$ 7,537,048**

TACOMA HOUSING AUTHORITY

CASH POSITION - July 2022

Account Name		Current Balance	Interest
HERITAGE BANK			
Accounts Payable		5,931,095	0.27%
Section 8 Checking		5,876,462	0.27%
THA Affordable Housing Proceeds-Salishan		1,976,977	0.27%
THA Scattered Sites Proceeds		5,901,646	0.27%
FSS Escrows		255,803	0.27%
CSA Escrows		123,670	0.27%
Note Fund Account		103	0.27%
Key Bank Security Deposits		1,055	0.27%
THA Investment Pool		338	0.27%
THDG - Tacoma Housing Development Group		924,229	0.27%
Salishan 7 Operations		1,824,011	0.27%
Salishan 7 Security Deposit		30,830	0.27%
Salishan 7 Replacement Reserve		539,242	0.27%
Salishan 7 Operating Reserve		204,180	0.27%
Highland Crest Operations		1,718,872	0.27%
Highland Crest Replacement Reserve		338,107	0.27%
Highland Crest Security Deposit		40,784	0.27%
Outrigger Operations		649,394	0.27%
Outrigger Replacement Reserve		278,079	0.27%
Outrigger Security Deposit		22,038	0.27%
Prairie Oaks Operations		266,844	0.27%
Prairie Oaks Replacement Reserve		42,813	0.27%
Prairie Oaks Security Deposit		6,602	0.27%
Payroll Account		12,348	0.27%
HOME STREET BANK			
James Center North Operations		1,393,141	0.00%
James Center North Security Deposit		73,859	0.00%
WASHINGTON STATE			
Investment Pool		$ 1,531,645	1.61%
1. TOTAL THA CASH BALANCE		**$ 29,964,166**	
Less:			
2. Total MTW Cash Balance		**$ 1,109,479**	
Less Minimum Operating Reserves			
2.01 Public Housing AMP Reserves (4 months Operating Exp.)			
2.02 S8 Admin Reserves (3 months Operating Exp.)		726,000	
2.09 Less Total Minimum Operating Reserves		$ 726,000	
2.1. MTW Cash Available (Lines 2-2.09)		**$ 383,479**	
3. MTW Cash Held By HUD		**$ 8,246,991**	
4. Non MTW Cash Restrictions/Obligations			
4.1 Non MTW Operational Restrictions			
4.10 HUD Restricted - Lot and Property Sales		$ 7,878,623	
4.101 Area 2B Sales Proceeds (Afford Hsg)	1,976,977		
4.102 Scattered Sites Proceeds (Afford Hsg)	5,901,646		
4.20 THA Property Accounts Reserved		$ 2,788,094	
4.201 Security Deposit Accounts	175,168		
4.202 Highland Crest Operations Reserves	320,000		
4.203 Highland Crest Replacement Reserves	338,107		

TACOMA HOUSING AUTHORITY

CASH POSITION - July 2022

4.204 James Center North Operations Reserves	230,000		
4.205 James Center North Capital	262,686		
4.206 Outrigger Operations Reserve	150,000		
4.207 Outrigger Replacement Reserves	278,079		
4.208 Prairie Oaks Operations Reserves	77,000		
4.209 Prairie Oaks Replacement Reserves	42,813		
4.210 Salishan 7 Operations Reserves	375,000		
4.211 Salishan 7 Replacement Reserves	539,242		
4.30 Rental Assistance Reserves		$ 1,394,470	
4.301 Mod Rehab Operating Reserves	118,014		
4.302 VASH, FUP, FYI, NED, EHV & MAIN HAP Reserves	896,982		
4.303 FSS & CSA Escrows	379,473		
4.40 Prepaid Grants		$ 1,797,785	
4.401 TPS Interlocal (CS-2017-011)	229,759		
4.402 Balmer Foundation - Education Prog (CS-2020-005)	269,243		
4.403 College Spark (PI-2018-005)	59,838		
4.404 GTCF Grant (PI-2019-005)	192,963		
4.405 Kresge Foundation - CHAP Program (RA-2019-009)	71,753		
4.406 Ballmer Foundation - COVID Rent Assist (RA-2020-003)	50,000		
4.407 THDG	924,229		
4.60 Total - Non MTW Cash Restrictions (4.10+4.20+4.30+4.40+4.50)		**$ 13,858,972**	
4.70 Agency Contracted or Budgeted Commitments Remaining		**$ -**	
	-		
	-		
4.99 Total Non MTW Cash Restrictions/Obligations *(Lines 4.60+4.70)*		**$ 13,858,972**	
5. THA UNENCUMBERED (Non-MTW) CASH (Lines 1-2-4.99)		**$ 14,995,716**	
6. Development Advances - Project Reimbursement upon closing/draw		**$ 3,388,688**	
6.01 Housing Hilltop LLLP	2,657,466		
6.02 Arlington Youth Center	731,222		

TACOMA HOUSING AUTHORITY

NEW BUSINESS

Resolution 1

TACOMA HOUSING AUTHORITY

RESOLUTION 2022-09-28 (1)

Date: September 28, 2022

To: THA Board of Commissioners

From: April Black
Executive Director

Re: Approval of THA's 2023 Moving to Work Plan

This resolution would authorize Tacoma Housing Authority's (THA) Executive Director to submit THA's 2023 Moving to Work (MTW) Plan.

Background

In accordance with its MTW agreement, THA must submit an annual MTW Plan to the Department of Housing and Urban Development (HUD). The Plan describes how THA will apply MTW in the next fiscal year, including its existing activities, any changes to existing activities, and new applications of this federal regulatory flexibility.

Each year, THA may propose new MTW activities intended to meet the statutory objectives of the MTW program:

1. Reduce costs and achieve greater cost effectiveness;
2. Increase economic independence and self-sufficiency among the families served;
3. Increase housing choices for low-income households.

MTW activities are best described as new policies or programs THA wishes to implement that require waiving HUD regulations.

2023 MTW Plan

In 2023, THA will continue to leverage its MTW flexibility to adapt our work to respond to emergent community needs. No new activities are being proposed for 2023. THA will remain focused on the following established priorities:

- Increase the Amount of Available Housing for Low-income Families
- Increase Housing Access and Stability
- Embed Principles of Diversity, Equity, Inclusion, and Belonging (DEIB) in THA's Programs, Culture, and Priorities
- Make THA a Great Place to Work

More details and information on each of these efforts can be found in the first several pages of the appended 2023 MTW Plan.

No new activities are being proposed; rather, THA is making activity revisions to some and further clarifying the activity scope, all of which THA may pursue without additional HUD waivers or authorizations. For example, in 2023, THA's Rental Assistance Department is planning to develop a landlord incentive program that includes benefits to landlords such as potential retention bonuses and establishing a vacancy loss payment policy. Additionally, THA's Department of Client Support and Empowerment will continue the redesign and implementation of its Family Self-Sufficiency (FSS) program to ease program participation and reduce requirements in which household members could receive escrow. THA is also using this opportunity to inform HUD of the decision to sunset the Housing Opportunity Program (HOP) and the criteria by which HOP households began transitioning to vouchers starting May 2022 upon a household meeting a qualified event. Beyond these program and policy revisions that aim to ease program administration and remove housing and programmatic barriers for clients, there are no significant changes in the 2023 MTW Plan.

Finally, it should be noted that during the 2023 MTW Plan year, THA is using its single source fund flexibility to explore new programs, such as initiating a local homeownership program to make access to homeownership more equitable and affordable to marginalized populations in Tacoma. THA will also use these funds to support renewed efforts to increase the number of customers and low-income Tacoma residents hired by THA and its partners and increase the number of minority- and women-owned business enterprises receiving contracts with THA and/or on projects paid for with THA funds.

Recommendation

Approve Resolution 2022-09-28 (1) authorizing the Executive Director to submit the Housing Authority of the City of Tacoma's Fiscal Year 2022 Moving to Work (MTW) Plan.

TACOMA HOUSING AUTHORITY

RESOLUTION 2022-09-28 (1)
Certifications of Compliance

Annual Moving to Work Plan Certifications of Compliance
U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan

Begins on next page.

CERTIFICATIONS OF COMPLIANCE

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
OFFICE OF PUBLIC AND INDIAN HOUSING

Certifications of Compliance with Regulations:
Board Resolution to Accompany the Annual Moving to Work Plan

Acting on behalf of the Board of Commissioners of the Moving to Work Public Housing Agency (MTW PHA) listed below, as its Chair or other authorized MTW PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the MTW PHA Plan Year beginning (01/01/2023), hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

(1) The MTW PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the MTW PHA conducted a public hearing to discuss the Plan and invited public comment.

(2) The MTW PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.

(3) The MTW PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1 (or successor form as required by HUD).

(4) The MTW PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.

(5) The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.

(6) The Plan contains a certification by the appropriate state or local officials that the Plan is consistent with the applicable Consolidated Plan.

(7) The MTW PHA will affirmatively further fair housing by fulfilling the requirements set out in HUD regulations found at Title 24 of the Code of Federal Regulations, including regulations in place at the time of this certification, and any subsequently promulgated regulations governing the obligation to affirmatively further fair housing. The MTW PHA is always responsible for understanding and implementing the requirements of HUD regulations and policies, and has a continuing obligation to affirmatively further fair housing in compliance with the 1968 Fair Housing Act, the Housing and Community Development Act of 1974, The Cranston-Gonzalez National Affordable Housing Act, and the Quality Housing and Work Responsibility Act of 1998. (42 U.S.C. 3608, 5304(b)(2), 5306(d)(7)(B), 12705(b)(15), and 1437C–1(d)(16)). The MTW PHA will affirmatively further fair housing by fulfilling the requirements at 24 CFR 903.7(o) and 24 CFR 903.15, which means that it will take meaningful actions to further the goals identified in its Analysis of Impediments to Fair Housing Choice(AI),Assessment of Fair Housing (AFH), and/or other fair housing planning documents conducted in accordance with the requirements of 24 CFR Part 5, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR 903.7(o), and will address impediments to fair housing choice identified in its AI, AFH, and/or other fair housing planning documents associated with any applicable Consolidated or Annual Action Plan under 24 CFR Part 91.

(8) The MTW PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975 and HUD's implementing regulations at 24 C.F.R. Part 146.

(9) In accordance with 24 CFR 5.105(a)(2), HUD's Equal Access Rule, the MTW PHA will not make a determination of eligibility for housing based on sexual orientation, gender identity, or marital status.

(10) The MTW PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.

(11) The MTW PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 75.

(12) The MTW PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.

(13) The MTW PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.

(14) The MTW PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.

(15) The MTW PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).

(16) The MTW PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the MTW PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.

(17) With respect to public housing and applicable local, non-traditional development the MTW PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.

(18) The MTW PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.

(19) The MTW PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.

(20) The MTW PHA will comply with the policies, guidelines, and requirements of 2 CFR Part 225 (Cost Principles for State, Local and Indian Tribal Governments) and 2 CFR Part 200.

(21) The MTW PHA must fulfill its responsibilities to comply with and ensure enforcement of Housing Quality Standards, as defined in 24 CFR Part 982 or as approved by HUD, for any Housing Choice Voucher units under administration.

(22) The MTW PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.

(23) All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the MTW PHA in its Plan and will continue to be made available at least at the primary business office of the MTW PHA.

Housing Authority of the City of Tacoma	WA005
MTW PHA NAME	***MTW PHA NUMBER/HA CODE***

I/We, the undersigned, certify under penalty of perjury that the information provided above is true and correct. WARNING: Anyone who knowingly submits a false claim or makes a false statement is subject to criminal and/or civil penalties, including confinement for up to 5 years, fines, and civil and administrative penalties. (18 U.S.C. §§ 287, 1001, 1010, 1012; 31 U.S.C. §3729, 3802).

Shennetta Smith	Chair
NAME OF AUTHORIZED OFFICIAL	***TITLE***
	September 28, 2022
SIGNATURE	***DATE***

* ***Must be signed by either the Chair or Secretary of the Board of the MTW PHA's legislative body. This certification cannot be signed by an employee unless authorized by the MTW PHA Board to do so. If this document is not signed by the Chair or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.***

TACOMA HOUSING AUTHORITY

2023 MOVING TO WORK PLAN

Table of Contents

Section I: Introduction 1
A. Long-Term Goals & Objectives 2
B. Short-Term Goals & Objectives 4

Section II: General THA Operating Information **6**
A. HOUSING STOCK INFORMATION 6
B. LEASING INFORMATION 12
C. WAITING LIST INFORMATION 15

Section III. Proposed MTW Activities **17**

Section IV. Approved MTW Activities **18**
A. IMPLEMENTED ACTIVITIES 18
1. Extend Allowable Tenant Absences From Unit For Active Duty Soldiers 19
3. Local Project-Based Voucher Program 20
5. Local Policies for Fixed-Income Households 22
6. Local Policies for Work-Able Households 24
7. Local Income and Asset Verification Policy 26
8. Local Interim Processing and Verification Policies (HCV/PH) 27
11. Simplified Utility Allowance 28
12. Local Port-Out Policy 29
15. Regional Approach for Special Purpose Housing 30
16. Creation and Preservation of Affordable Housing 32
17. Housing Opportunity Program (HOP) 34
18. Elimination of the 40% Rule 36
19. Modify the Family Self-Sufficiency (FSS) Program 37
20. MTW Seed Grants 39

22. Exclude Excess Income from Financial Aid for Students 40
24. Rental Assistance Success Initiative (formerly) Local Security and Utility Deposit Program 41
25. Modify HQS 43
B. NOT YET IMPLEMENTED ACTIVITIES 45
C. ACTIVITIES ON HOLD 45
SECTION D. CLOSED OUT ACTIVITIES 46

Section V: Sources and Uses of MTW Funds 48
A. Planned Application of MTW Funds 48

Section VI: Administrative 54
A. Board Resolution and Certification of Compliance 54
B. Documentation of Public Process 55
C. Planned and Ongoing Evaluations 57
D. Lobbying Disclosures 57

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Tacoma, WA 98405

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Director of Finance

HOUSING AUTHORITY
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1940
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Section I: Introduction

THA recognizes that the pandemic, and impacts stemming from it, are far from over. The immediate impacts of the pandemic included households being affected by the virus and residents becoming increasingly behind on rent. More recently, the emergence of supply chain issues and rising inflation have impacted the cost of living. As a result of mortgage rate increases more people have re-entered the rental market, exacerbating an already limited supply of housing. Through all this, THA's residents and stakeholders have been and continue to be the most impacted. Thus, in 2023, what grounds THA's initiatives is its desire to serve as a stabilizing force for residents and community stakeholders. Moreover, THA will focus our energies on increasing access to housing, increasing the amount of available housing for low-income families, deepening housing affordability, and helping customers on our programs thrive.

To do this work, it requires taking a step back and aligning systems, when possible, to maximize impact for our residents and Tacomans facing housing instability. In 2023, THA will further align itself with other housing and service systems, including investing THA time and resources in Coordinated Entry so we can strive to have a single point of entry into all housing programs in Tacoma. Furthermore, we are invested in developing a systems-level strategy that connects residents with existing educational and apprenticeship pathways. This work, which includes aligning with community goals, data sharing, and building capacity to scale current promising approaches, is being done in partnership with the Foundation for Tacoma Students.

THA will also continue to build on its evaluative and improvement-focused ethos so we can continue to better serve the community. The last two years led to the redesign of major programs, including the Housing Opportunity Program (HOP). Previously in its former program design, HOP was time-limited in nature and subsidies did not adjust when households lost income. This subsidy model, in combination with an increasingly competitive rental market, delivered less successful outcomes than traditional income-based and non-time limited vouchers, especially for Black, Indigenous, and other People of Color (BIPOC) households. As a result, THA felt this pivot back towards vouchers was necessary. Staff have done a heroic job initiating the transition to the first rounds of households; in 2023, it will be our focus to ensure implementation stays on track so that we can eventually start monitoring outcomes and ensure households are indeed becoming more housing stable in light of this programmatic shift.

THA is also continuing to adapt in our Housing Hilltop development project, a project that will become one of THA's largest affordable housing developments in 20 years since Salishan. In 2023, THA will be making large development decisions that aim to keep at the forefront the intent of the project and to meet the community's goals, while also being financially sustainable and maximizing limited resources to bring more affordable housing into the neighborhood and City. We are springing into 2023 with a refreshed energy. THA staff are inventive problem solvers and with that comes creative solutions. That embodies the lifeforce of MTW for us and we are excited for what 2023 will bring.

A. Long-Term Goals & Objectives

The strategic objectives identified below advance THA's 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, experience as "safe, vibrant, prosperous, attractive, and just." Ultimately, Tacoma Housing Authority drives for a community commitment to housing as a human right.

As we look toward the next several years, we will set goals, metrics, and strategies to support the four goals:

Increase the amount of available housing for low-income families

- In the next 5 years:
  - Add at least 500 new units of affordable housing through development or partnerships.
  - Purchase at least 200 housing units that can be prioritized for voucher holders.
  - Rehabilitate and or refinance at least 100 units of existing housing to improve quality of life for tenants and long-term viability of the property.
- In the next year, develop a process or program for THA customers to purchase homes.

Increase Housing Access & Stability

- Maintain a 98% occupancy rate or higher in THA's portfolio.
- Maintain THA's MTW requirement to serve substantially the same number of customers.
- In the next year, decrease the number of households on THA programs paying more than 40% of their income for housing.
- In the next 2 years, increase the percent of households able to secure housing with a voucher from 55% to 60%.
- Within 3 years, develop a strategy for measuring customer (housing recipients, landlords, vendors, etc.) satisfaction and publish baseline data.

Embed Principles of Diversity, Equity, Inclusion & Belonging (DEIB) in THA's programs, culture & priorities

- In the next year, in an effort to increase accessibility and ease of doing business with THA, increase the number and percentage of THA invoices paid within 30 days from the date of invoice and work to reduce the barriers to disadvantaged business enterprises.
- In the next year, review where and how to set goals related to the use of Universal Design.
- In the next 2 years, increase the percentage (by number and dollars) of minority and women-owned businesses receiving contracts or direct purchase requisitions with THA and/or on projects paid for with THA funds.

- In the next 3 years, review THA policies and practices related to housing, procurement, and employment and revise them to make them more equitable.

Make THA a great place to work

- In the next year, increase THA retention from 79% to 85%.
- In the next year, increase the number and hours worked of THA residents and low-income Tacomans hired into THA jobs and THA-funded work.
- In the next year, increase the number and percentage of THA staff earning a housing wage.
- Within two years, develop a strategy for measuring staff satisfaction and publish baseline data.

B. Short-Term Goals & Objectives

The pandemic is requiring us to continually relearn and adjust the ways we do our work. That work includes managing a large and varied portfolio of properties that houses marginalized households; paying rent on behalf of thousands of voucher holders to hundreds of landlords; completing large, complicated real estate projects; and providing supportive services to an increasingly stressed population of clients.

In 2023, THA will continue to respond to the community's needs while leveraging MTW flexibility to:

Increase the Amount of Available Housing for Low-income Families

- We will focus efforts on projects that are financially feasible and/or can be accomplished with partners.
- THA will focus on acquiring housing units to add to THA's portfolio.
- THA will explore ways it can use MTW flexibility to make homeownership options available to its customers.

Increase Housing Access & Stability

- Transitioning HOP households to the traditional HCV voucher helps deepen affordability for households whose rents would have been unaffordable if their incomes decreased.
- THA has established a regular schedule for analysis to ensure THA's payment standards are keeping pace with the market, enabling households to secure housing.
- THA is aligning with existing systems of care, housing, and education partners to have a larger impact among THA residents and those most likely to face a housing crisis.
- THA will continue the redesign of the Family Self-Sufficiency (FSS) program and continue to support families with children in middle school and/or high school through the recently implemented Two Generational Program (2Gen).
- THA is creating a comprehensive data system that connects the organization and better manages data, enabling us to make data-driven decisions and continually improve operations and programs.

Embed Principles of Diversity, Equity, Inclusion & Belonging (DEIB) in THA's Programs, Culture & Priorities

- THA will begin collecting data on the number of disadvantaged business enterprise, including minority and women-owned businesses, Section 3 businesses, and veterans-owned businesses receiving contracts with THA and/or on projects paid for with THA funds. We will also try to attract more of those businesses.
- THA will review THA policies and practices related to housing programs and services, procurement, and employment; revise them to make them more equitable; and establish a consistent review cycle thereafter.
- THA will raise awareness and increase understanding of the foundational definitions and principles of diversity, equity, inclusion, and belonging for THA staff, leadership, and Board of Commissioners realize better communication and provision of housing and support services.

- THA will develop an inclusive governance and collaboration structure to establish and move forward THA's strategies and priorities; establish regular review cycles to ensure THA's decision-making structures are audited through a DEIB lens.

Make THA a Great Place to Work

- THA will focus on equitable hiring, improving retention and increasing the number of customers and low-income Tacoma residents hired by THA and its partners.
- There will be a greater percentage of THA staff being paid housing wage—the hourly wage needed to afford a two-bedroom unit in Tacoma. As of the writing of this report, a 2-bedroom apartment in Tacoma required a full-time wage of $32 per hour.

Section II: General THA Operating Information

A. HOUSING STOCK INFORMATION

Planned New Public Housing Units

New public housing units that the MTW PHA anticipates will be added during the Plan Year

ASSET MANAGEMENT PROJECT (AMP) NAME AND NUMBER	BEDROOM SIZE						TOTAL UNITS	POPULATION TYPE*	# of Uniform Federal Accessibility Standards (UFAS) Units	
	0/1	2	3	4	5	6+			Fully Accessible	Adaptable
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Total Public Housing Units to be Added in the Plan Year **N/A**

Planned Public Housing Units to be Removed

Public housing units that the MTW PHA anticipates will be removed during the Plan Year

AMP NAME AND NUMBER	NUMBER OF UNITS TO BE REMOVED	EXPLANATION FOR REMOVAL
N/A	0	N/A
	0	

Planned New Project Based Vouchers

Tenant-based vouchers that the MTW PHA anticipates project-basing for the first time during the Plan Year. These include only those in which at least an Agreement to enter into a Housing Assistance Payment (AHAP) will be in place by the end of the Plan Year. Indicate whether the unit is included in the Rental Assistance Demonstration (RAD).

PROPERTY NAME	# of PBV	RAD?	DESCRIPTION OF PROJECT
N/A	N/A	N/A	N/A
	N/A	**Planned Total Vouchers to be Newly Project-Based**	

Planned 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 at least an AHAP is already in place at the beginning of the Plan Year. Indicate whether the unit is included in RAD.

PROPERTY NAME	# of PBV	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Arlington Youth Drive	58	Leased/Issued	No	Youth and Young Adult Housing
Bay Terrace 1	20	Leased/Issued	No	THA Family Housing
Bay Terrace 2	52	Leased/Issued	No	THA Family Housing
Bay Terrace – RAD	26	Leased/Issued	Yes	THA Family Housing
Eliza McCabe Townhomes	10	Leased/Issued	No	Mercy Housing Family Housing
Exley / St. Helens	13	Committed	No	Housing for people exiting the criminal justice system (formerly known as DOC CHAP)
Flett Meadows	13	Leased/Issued	No	LASA Family Housing
Guadalupe Vista	38	Leased/Issued	No	CCSWW Family Housing
Harborview Manor	147	Leased/Issued	No	Affordable Senior Housing
Hillside Gardens	8	Leased/Issued	No	THA Family Housing
Hillside Terrace 1500	12	Leased/Issued	No	THA Family Housing
Hillside RAD	33	Leased/Issued	Yes	THA Family Housing

PROPERTY NAME	# of PBV	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Hillside 2	13	Leased/Issued	No	THA Family Housing
Hilltop Lofts	57	Leased/Issued	No	Permanent Supportive Housing
Home at Last	30	Leased/Issued	No	YWCA Family Housing
Nativity House	50	Leased/Issued	No	CCSWW Permanent Supportive Housing for adults
New Tacoma Phase 2	8	Leased/Issued	No	Senior housing
Olympus Apts.	18	Leased/Issued	No	KWA affordable housing units at 60% AMI or below
Pacific Courtyards	23	Leased/Issued	No	MDC transitional family housing
Rialto Apts.	52	Leased/Issued	No	PHS affordable housing units at 50% AMI or below
Salishan 1-7[1]	340	Leased/Issued	No	THA Family Housing
Salishan RAD	290	Leased/Issued	Yes	THA Family Housing
The Rise at 19th	64	Leased/Issued	No	THA Family housing
Tyler Square	15	Leased/Issued	No	TRM Family Housing
Renew Tacoma Housing	456	Leased/Issued	Yes	THA Senior/Disabled Housing
PBV VASH	30	Leased/Issued	No	3rd party PBV VASH

[1] Please note: Salishan 7 never had public housing units and will not be found in PIC

PROPERTY NAME	# of PBV	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
	1,818	**Planned Total Existing Project-Based Vouchers**		

Planned Other Changes to MTW Housing Stock Anticipated During 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.

PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED IN THE PLAN YEAR
THA will 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 has sold the last seven lots 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 unit is being leased to a large family. This will leave THA with 719 public housing units available for use under Faircloth. THA is considering placing Public Housing Faircloth units in new acquisitions and new developments and eventually converting these units to RAD.

General Description of All Planned Capital Expenditures During the Plan Year

Narrative general description of all planned capital expenditures of MTW funds during the Plan Year.

GENERAL DESCRIPTION OF ALL PLANNED 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 will receive minimal Capital funds in 2023, yet has funds carried over from 2022 that will be reflected in the budget and will transfer to Operations. In terms of general capital expenditures outside of development and recapitalization activities, THA has approximately $1.9 million budgeted for IT software upgrades and equipment and $50,000 for maintenance vehicles.

B. LEASING INFORMATION

Planned Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA plans to serve at the end of the Plan Year.

PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH:	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED**
MTW Public Housing Units Leased	60	5
MTW Housing Choice Vouchers (HCV) Utilized	48,890	4,074
Local, Non-Traditional: Tenant-Based^	1,699[2]	142
Local, Non-Traditional: Property-Based^	4,224	352
Local, Non-Traditional: Homeownership^	0	0
Planned Total Households Served	**54,873**	**4,573**

* "Planned Number of Unit Months Occupied/Leased" is the total number of months the MTW PHA plans to have leased/occupied in each category throughout the full Plan Year.

** "Planned Number of Households to be Served" is calculated by dividing the "Planned Number of Unit Months Occupied/Leased" by the number of months in the Plan Year.

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

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

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED*
Tenant-Based	Regional Approach for Special Purpose Housing/15	1,699	142
Property-Based	Creation & Preservation of Affordable Housing/16	4,224	352
Homeownership	N/A	0	0

* The sum of the figures provided should match the totals provided for each local, non-traditional category in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

Discussion of Any Anticipated Issues/Possible Solutions Related to Leasing

Discussions of any anticipated issues and solutions in the MTW housing programs listed.

HOUSING PROGRAM	DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS
MTW Housing Choice Voucher/Portfolio	The pandemic and resulting economic impacts are making leasing up in this current climate extremely difficult. Despite the uncertainty and operational challenges, THA ended the year with a 101.62% utilization rate on average in 2021. THA's portfolio maintained a 99% and 98% lease up rate throughout 2021 and 2022, respectively. We anticipate these trends to continue in 2023. THA is utilizing housing navigators and has partnerships with Housing Connector for THA programs serving voucher households who face greater barriers on the private housing market. THA continues to utilize its Landlord Specialist and MTW flexibilities to cultivate strong relationships with landlords and recruit new landlords in this very competitive housing market.
Local, Non-Traditional	For THA's local, non-traditional housing program for RRH, the county is responsible for allocating THA's investment to local rapid rehousing providers. Depending on the capacity of Pierce County and local providers to utilize and allocate these funds, there may be issues related to fully utilizing the allocated amount. THA will work closely with Pierce County to monitor the contract amount and the number of households served and will respond accordingly.

C. WAITING LIST INFORMATION

Snapshot information of waiting list data as anticipated at the beginning of the Plan Year. The "Description" column 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	PLANS TO OPEN THE WAITING LIST DURING THE PLAN YEAR
THA Consolidated Waitlist	Other/ Consolidated waitlist for THA voucher programs and THA site-based waiting list	948	Closed	Yes

Please describe any duplication of applicants across waiting lists:

N/A

Planned Changes to Waiting List in the Plan Year

Please describe any anticipated 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 PLANNED CHANGES TO WAITING LIST
THA Consolidated Waitlist	THA plans to open its waitlist to all households in the 2023 plan year. THA is exploring changes to its consolidated waitlist, including ways to increasingly leverage the Tacoma/Pierce County Coordinated Entry System as part of its process to pull from the waitlist.

Section III. Proposed MTW Activities

N/A

Section IV. Approved MTW Activities

A. IMPLEMENTED ACTIVITIES

1. Extend Allowable Tenant Absences 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.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity during the Plan year.

3. Local Project-Based Voucher Program

Plan Year Approved, Implemented, Amended: THA proposed this activity in 2011 and it has been completely implemented.

Description: This program introduced several changes to the way THA operates the project-based voucher program. They are as follows:

- **Remove 20% cap on project-based vouchers 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, allowing us to finance more developments in the future. THA staff are continuously monitoring its funding used for PBVs and ensuring any significant investments are justified in meeting local needs with data-informed planning.

- **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 conducts Housing Quality Standards (HQS) inspections on units it owns or has interest in. In order to operate one, streamlined property management approach, THA also conducts HQS inspections on the small number of Public Housing Units it owns.

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

  THA initially used this activity to waive the mobility option that allowed PBV tenants to automatically receive a tenant-based voucher after one year of occupancy. Once THA converted a majority of its PBV units to RAD-PBV, THA revised its Choice Mobility policies. The RAD rules require THA to offer Choice Mobility vouchers to RAD-PBV tenants. In 2017, THA's board approved a revised version of this policy that made Choice Mobility available to *all* PBV tenants – given that certain criteria were met. PBV households that wish to exercise Choice Mobility must meet the following requirements: 1) in good status/no debts owed; 2) one-time use policy 3) receive pre-issuance counseling; 4) unpaid tenant charges that could result in termination of voucher assistance. THA grandfathered in anyone who had a PBV before October 1, 2011.

- **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.

- **Expanded Allowable Housing Types**
  Since 2011, THA has been authorized to expand the definition of eligible housing types to include transitional housing, cooperative housing, and shared housing. The flexibility allows THA to project-base units targeted for special populations, such as those exiting the criminal justice system, homelessness, or the foster care system.

- **Emergency Operations**
  In 2021, HUD approved a proposal that allows THA to adjust operations and policies, as needed, during times of declared emergencies. See Appendix C: THA's Emergency Operations. During the COVID pandemic, HUD waived certain program requirements and rules that helped public housing authorities respond to the pandemic. Using MTW flexibility, THA has adopted similar waivers for future use during times of emergency that would significantly disrupt daily operations for THA staff and residents, clients, and applicants.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity in the Plan year.

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. THA may institute policies that could require recertifications on an annual schedule for households with less than $5,000 in income.
- 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 those who income-qualified for a hardship to receive one. In 2020, THA revised its hardship policy to remove the third-party documentation requirements to make it easier and less burdensome for households to apply for hardship.

During the COVID pandemic, HUD waived certain program requirements and rules that helped public housing authorities respond to the pandemic. Using MTW flexibility, THA has adopted similar waivers for future use during times of emergency that would significantly disrupt daily operations for THA staff, residents, clients, and applicants. In 2021, HUD approved changes that will allow THA to implement policy changes as needed during times of declared emergencies. See Appendix C: THA's Emergency Operations.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity in the Plan year.

6. Local Policies for Work-Able Households

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 in its federally subsidized programs. 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;[3]
- 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).

This above rent policy allows THA to streamline the process of rent calculations and annual reviews. THA has made changes to forms and documents in order to administer the rent reform program successfully and continues to see staff time and cost savings because of the biennial review schedule.

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.

[3] Beginning 2023, THA may institute policies that could require recertifications on an annual schedule for households with less than $5,000 in income.

During the COVID pandemic, HUD waived certain program requirements and rules that helped public housing authorities respond to the pandemic. Using MTW flexibility, THA has adopted similar waivers for future use during times of emergency that would significantly disrupt daily operations for THA staff, residents, clients, and applicants.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity in the Plan year.

7. Local Income and Asset Verification Policy

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: As part of this activity THA implemented the following policies:

- Allow tenants to self-certify assets valued at less than $25,000.
- Disregard income from assets valued at less than $25,000.
- Eliminate earned income disallowance (EID).
- Exclude resident stipends up to $500.
- Accept hand-carried third-party verifications and increase number of days verifications are valid up to 180 days.
- Extend the authorization of the HUD 9886 form.
- Accept hand carried verifications.

These changes allowed THA to further streamline inefficient processes and save both staff time while reducing the burden on clients to provide information that made little difference in rent calculation.

During the COVID pandemic, HUD waived certain program requirements and rules that helped public housing authorities respond to the pandemic. Using MTW flexibility, THA has adopted similar waivers for future use during times of emergency that would significantly disrupt daily operations for THA staff, residents, clients, and applicants. In 2021, HUD approved changes that will allow THA to implement policy changes as needed during times of declared emergencies. See Appendix C: THA's Emergency Operations.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Significant Changes: THA does not anticipate additional authorizations for this activity during the Plan year.

8. Local Interim Processing and Verification Policies (HCV/PH)

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: The purpose of this activity is to streamline the interim review process. THA found that parts of its interim policy were causing more work than necessary. Because of that, THA will no longer require an interim increase for every income increase reported and will process interim decreases when the income loss is 20% or more. THA will also limit interims to two per recertification cycle. In 2013, a process improvement project led to THA accepting all interims online. The activity has worked well with THA providing supports to clients who cannot use a computer and need assistance.

During the COVID pandemic, HUD waived certain program requirements and rules that helped public housing authorities respond to the pandemic. Using MTW flexibility, THA has adopted similar waivers for future use during times of emergency that would significantly disrupt daily operations for THA staff, residents, clients, and applicants. In 2021, HUD approved changes that will allow THA to implement policy changes as needed during times of declared emergencies. See Appendix C: THA's Emergency Operations.

Planned Non-Significant Changes: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Significant Changes: THA does not anticipate additional authorizations for this activity during the Plan year.

11. Simplified Utility Allowance

Plan Year Approved, Implemented, Amended: THA proposed and implemented this activity in 2011.

Description: This activity streamlined the utility allowance (UA) given to THA's clients and residents. Historically, THA's utility allowances varied by building type, bedroom size, and type of fuel/energy used. These variables resulted in numerous possible utility allowance combinations that were difficult to explain to property owners and clients, and often resulted in methodological misunderstandings. The new UA schedule was streamlined by eliminating the structure and energy type differentiators.

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.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Significant Changes: THA does not anticipate additional authorizations for this activity during the Plan year.

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, or for 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.

Planned Non-Significant Changes: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any changes to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate additional authorizations for this activity during the Plan year.

15. Regional Approach for 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 used to assist households receiving services through Rapid Rehousing.

For households being served through Rapid Rehousing, THA will continue to count households assisted under this activity as "served" six months post-participation. THA's partners report that THA funded service providers may still provide case management to households up to six months post program participation. Households are allotted a six-month period, similar to the "hold" voucher holders are permitted after being notified of a pending End of Participation (EOP). This provides a safety net for households who may still need support after their housing assistance has ended. This allows families to receive the services they need without requiring them to re-enter the Coordinated Entry system.

THA also uses the flexibility granted under this activity to designate one of its public housing scattered units as shelter to homeless and unaccompanied youth in Tacoma and Pierce County.

Effective December 31, 2022, TSHAP is no longer operating. Historically, TSHAP operated through the following guidelines:

In late 2020, THA, Tacoma Public Schools (TPS), and Pierce County launched the Tacoma Schools Housing Assistance Program (TSHAP). TPS families identified as McKinney-Vento 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.

Planned 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 in December 2022. The partners continue to explore developing a permanent pathway for McKinney-Vento students and their families that leverages Pierce County's existing emergency housing resources.

Planned Changes to Metrics/Data Collection: THA will maintain its metrics but will only be reporting on households served in the local RRH program since TSHAP will have end by the beginning of the 2023 plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity for the Plan year.

16. Creation and Preservation of Affordable Housing

Plan Year Approved, Implemented, Amended: This activity was proposed in 2012 and implemented in 2012. This activity is to preserve and create affordable housing units under MTW. These units would be affordable housing units, not public housing and there will not require an operating subsidy. This activity was re-proposed in 2019 to include the use of MTW funds for Property-Based Rental Subsidies.

Description: The flexibility granted through this activity allows THA to acquire or develop affordable housing to households at or below 80% of AMI within the City of Tacoma. THA intends to allow eligible low-income families to reside in these units, including those that may be receiving HCV rental assistance. This activity allows THA to preserve affordable housing stock within Tacoma, especially in areas where rents are quickly becoming unaffordable. THA recognizes that this entire activity is under the parameters of PIH Notice 2011-45 and will abide with the notice when implementing this activity. THA has used this activity to increase the affordable housing stock in Tacoma in the following ways:

Property-Based Subsidies: In 2018, THA re-proposed the activity to utilize its flexibility to place property-based subsidies in up to 500 units. Property-Based Rental Subsidies are contributions to properties that agree to make its units available at a rental price affordable to very low-income households. THA contracts with property owners who agree to these terms and in return THA would make contributions to the property based on a negotiated contract where the tenant contribution plus the subsidy would not exceed the market value of the unit based on a rent comparability study. Eligible unit and housing types include but are not limited to: shared housing, cooperative housing, transitional housing, high-rise buildings, hotels/motels, and tiny homes.

Development and Acquisition: THA seeks to acquire existing rental housing in neighborhoods where THA does not have a strong presence to preserve housing affordability. Acquiring existing rental housing that is affordable to households earning 80% or less of the AMI is one of THA's rental housing preservation strategies. Under this activity THA is able to activate its broader use of funds ability so the agency could spend MTW dollars on construction and acquisition of affordable housing units. THA is using its MTW dollars to develop and/or acquire the following projects:

(1) Housing Hilltop – 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 consisted of the development of 57 studio units of permanent supportive housing for individuals exiting homelessness. This project, referred to as Hilltop Lofts, was done with a local non-profit partner. Construction completed and the lease up process began at the end 2022. Phase II will be orientated toward low-income individuals and families in a mix of studio, 1-, 2- and 3-bedroom units, as THA will develop 231 affordable housing units. There will be 13,000 square feet of commercial retail space, including a 10,000 square foot performing arts and community gathering space in which THA will prioritize BIPOC-owned businesses to lease the spaces.

(*2) 1800 Hillside Terrace* (The Rise on 19th) – MTW funds were used to develop what is now referred to as the Rise on 19th, formerly Hillside Terrace. Phase I and II are completed and fully on-line. The Rise provides 64 units of deeply affordable housing for homeless individuals and small families, as well as people with disabilities and other low-income households.

(3) *James Center North / Aviva Crossing* – THA acquired a 7-acre retail and commercial area that poses a good transit-oriented development opportunity. It is also directly across the street from the Tacoma Community College and close to transit, shopping, and entertainment. THA is working with local housing partners on the sale and development of affordable units in West Tacoma in which THA anticipates construction will begin in 2023 and 2024. 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.

(4) *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.

(5) *Intergenerational Housing (Hillsdale Heights)* – THA is exploring an intergenerational housing project that will serve a multigenerational community where children who have experienced trauma can receive love and care from kinship and adoptive parents and live in a community with seniors who by living there agree to be respite caregivers, honorary grandparents, and tutors to the families.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the metrics or data collection during the Plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity for the Plan year.

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: Effective May 1, 2022, THA is no longer issuing new HOP subsidies as THA will be sunsetting HOP. Please see the *Planned Non-Significant Changes* section below for more details about the transition process.

Historically, HOP operated through the following guidelines:
All new admissions to THA's tenant-based voucher program receive a HOP subsidy. A HOP subsidy is a fixed subsidy as opposed to a subsidy based on income. The fixed subsidy is determined by the household size at admission and 50% of the current payment standard. This is applicable for both elderly/disabled households and work-able households. However, work-able households are subject to five-year term limits; whereas, elderly/disabled households may receive assistance indefinitely. The goal of the program is to help our participants achieve self-sufficiency by assisting them with their housing needs for a specific term and to give other waiting households a turn to receive assistance.

Through the use of targeted funding, THA also provides a limited number of HOP subsidies to two programs: the College Housing Assistance Program (CHAP) and the Children's Housing Opportunity Program (CHOP).

> **CHAP**: THA partners with the Tacoma Community College (TCC) to provide rental assistance to TCC's population of homeless and near homeless students. TCC provides services designed to help the families succeed so they are ready to be independent of housing subsidies after graduation. The program offers the same fixed subsidy as the HOP program and has a five (5) year limit on assistance. Graduates are considered a success and are transitioned off of the program with up two twelve (12) months of additional assistance to serve as an income-building year, not to exceed the five (5) year limit. The community college handles all eligibility but participants must be an active student at the community college and/or transferring to University of Washington, Tacoma. Students must stay in college and make satisfactory academic progress towards a degree or certificate.
>
> **CHOP:** THA partnered with the Department of Children, Youth and Families (DCYF) to provide rental assistance to families who need housing to prevent or shorten their child's foster care placement or to house a teenager aging out of foster care who otherwise would begin his or her adulthood in homelessness. To date, CHOP has helped 33 families stay together or re-unite sooner.

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.

Planned Non-Significant Changes: Effective May 1, 2022, THA is no longer issuing new HOP subsidies as THA is sunsetting HOP. THA completed an assessment in 2021 that found that the program delivered less positive outcomes than traditional income-based and non-time limited vouchers. Since the program's initial design and implementation in 2012, Tacoma's rental market has become increasingly constrained and expensive. A flat, time-limited subsidy like HOP cannot keep pace.

THA will transition a household's HOP subsidy when a household meets one of the qualifying events: change in household composition; a landlord requested rent change; or when a household completes their annual recertification. If and when a household moves, they will transfer to the HCV program. This means HOP households will start conforming to the same rules and rent calculations used for the Housing Choice Voucher Program.[4] As THA begins sunsetting the program after May 1, 2022, the following HOP program elements will no longer apply to HOP participants when they experience a qualifying event:[5]

- Work-able households being subject to a 5-year time limit (excluding CHAP).
- A person with a HOP subsidy not being able to transfer to another THA program or port out of THA's jurisdiction.
- THA's subsidy not increasing if household size increases, or the landlord requests a change in the rent amount.
- The HOP program not having utility allowances

THA anticipates it will keep this activity open until the last HOP subsidy converts to HCV or stops receiving THA assistance. No additional waivers or authorizations will be needed to implement the changes under consideration.

Planned Changes to Metrics/Data: THA does not anticipate any changes to the baselines or benchmarks during the plan year.

Planned Significant Changes: Because THA decided in May 2022 to sunset HOP and keep this activity open until the last HOP subsidy converts to HCV or the household exists the program, there will not be any planned significant changes needed for this plan year.

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[4] Traditional voucher requirements in this context include voucher flexibilities granted to THA as authorized in its MTW Agreement and corresponding plans with HUD.

[5] The transitional plan to shift from HOP subsidies to HCVs are described further in THA's operational policies and consistent with THA's Admin Plan and MTW Plan.

18. Elimination of 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. 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.

Planned Non-Significant Changes: THA does not anticipate any changes to this activity during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Significant Changes: THA does not anticipate any significant changes to this activity for the Plan year.

19. Modify the Family Self-Sufficiency (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 clearer guidelines for participating families. THA has designed a savings calculation method under which families may qualify for one or more pay points. Pay points will be calculated and credited at the end of the FSS contract term and only if the family provides credible and verifiable documentation that show they qualify for each of the pay point credit types. 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. Below are examples of pay points:

- $2,000 Maintain 32 hours/week employment for a minimum of 6 consecutive months
- $1,000 Complete ESL classes; Levels 1-5, $200 per level
- $100 Receive certificate of successful completion of financial literacy
- $3,000 Complete educational goal such as a GED, degree from an accredited school/college, vocational certificate, etc. Maximum escrow credit for achieving educational goals is $3000 per family.
- $500: 0-6 months vocational training certificate
- $750: 7-12 months vocational training certificate
- $1,000: 13-24 months vocational training certificate
- $1,500-Associate degree
- $2,000-Bachelor's degree

In addition, THA has removed the requirement that households need to be off cash assistance for 12 consecutive months prior to program graduation as a determinant to access escrow funds.

Planned Non-Significant Changes: THA has been assessing its FSS program to better meet the needs of participants. THA is looking to make the following changes: altering the criteria and funding amount in its pay points; reducing the timeframe of participation such that we allow participants to graduate once they have completed their FSS goals (Individual Training & Support Plan completion); allow more than one member of a household to receive escrow; and allow individual escrow payout to take place upon ITSP completion. THA continues its assessment of the FSS program, and THA may include additional changes to its FSS program that may impact its program eligibility or types of services rendered by FSS staff. No additional waivers are needed to implement these changes.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the metrics or data collection during the Plan year.

Planned Significant Changes: THA does not anticipate any significant changes during the Plan year.

20. MTW Seed Grants

Plan Year Approved, Implemented, Amended: This activity was proposed in 2013 and implemented in 2013.

Description: THA proposed this activity so, if needed, the agency could provide seed grants to partner service agencies to increase 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. In 2023, THA would like to keep this activity in the implemented section of the plan to support future goals of increasing the number of customers and low-income Tacoma residents hired by THA and its partners and expanding opportunities for training and certifications so residents can be competitive in the current job market (aligned with Section 3 efforts).

Planned Non-Significant Changes: THA will do more planning between 2022-2023 focused on Section 3 strategies to hire residents and increase access to certifications and training opportunities in collaboration with other service partners. These planning sessions may further clarify THA's strategies and goals related to this activity in 2023.

Planned Changes to Metrics/Data Collection: THA has worked with HUD to implement new standard metrics for this activity and does not anticipate any changes to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate additional authorizations for this activity during the Plan year.

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.

Planned Non-Significant Changes: THA does not anticipate any modifications to the baselines or benchmarks during the Plan year.

Planned Changes to Metrics/Data Collection: THA does not anticipate any changes to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate any significant changes in the Plan year.

24. Rental Assistance Success Initiative (formerly) Local Security and Utility Deposit Program

Plan Year Approved, Implemented, Amended: THA proposed this activity in its 2014 MTW Plan and implemented the program in January 2016. Minor amendment in 2019.

Description: Initially this activity was solely a security deposit assistance program that was open to THA applicants in its Tacoma Public Schools Special Housing Project, its College Housing Assistance Program, and any of THA's affordable housing applicants/residents who needed assistance in order to move into a unit. THA realized that many households did not have the resources to pay the security deposit once they reached the top of the waitlist and were offered a unit. This program ensured that families 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 and retention in THA's rental assistance programs. THA intends to operationalize a landlord incentive program that includes benefits to landlords such as potential retention bonuses and establishing a vacancy loss and payment policy.

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.

Renters Readiness Certification is going strong, more households are attending the class now that it is held online. Tacoma Public Utilities (TPU) is finalizing an agreement with Sound Outreach, to offer low-income attendees that qualify a credit on their TPU bill upon completion of all 3 classes.

In 2021**,** THA implemented a pilot program for housing navigation assistance for THA's Mainstream program and the College Housing Assistance (CHAP) program. These program participants tend to have greater barriers, increasing the time it takes them to successfully lease-up.

Planned Non-Significant Changes: 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 and retention in THA's rental assistance programs. During the 2023 plan year, THA

intends to operationalize a landlord incentive program that includes benefits to landlords such as potential retention bonuses and establishing a vacancy loss and payment policy. No additional waivers are needed to implement these changes.

Planned Changes to Metrics/Data Collection: THA does not anticipate any modifications to the baselines or benchmarks during the plan year.

Planned Significant Changes: THA does not anticipate any significant changes in the Plan year.

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.

4. In lieu of an initial inspection completed by Rental Assistance HQS Inspection Staff, THA may accept "self-certified inspections" from Property Management staff for THA-Owned Units. Qualified and trained PM staff may certify that the unit has been inspected and that the property meet HUD and THA HQS inspection standards. These self-certifications would be documented through the submission of an HQS inspection check-list for each unit. Rental Assistance HQS Staff would then QA a certain percentage of these units, no less than 10%, each year. Eligible units are those owned by THA directly or in partnership with THA. Only units with construction dates after 1978 would be eligible for participation. During the QA process, should THA find any items that fail inspection, THA would require that all fail items be resolved just as we do with other standard inspection requirements. Furthermore, if less than 80% of inspections of the randomly selected QA inspections pass, THA would QA another sample and repeat the process as deemed necessary.

5. Pre-inspections could be allowed for any units that previously had an HCV tenant and/or for units owned by landlords that express interest in renting to a voucher holder. Pre-inspections could be good for 90 days.

In addition, THA has considered implementing a triennial inspection schedule for its housing portfolio (units owned and managed by THA) to streamline the inspection process and reduce disruption to residents' lives. THA's Portfolio includes units layered with PBV assistance and LIHTC which both require regular inspections.
Finally, in 2021, HUD approved a proposal that allows THA to adjust operations and policies, as needed, during times of declared emergencies. See Appendix C: THA's Emergency Operations. During the COVID pandemic, HUD waived certain program requirements and rules that helped public housing authorities respond to the pandemic. Using MTW flexibility, THA has adopted similar waivers for future use during times of emergency that would significantly disrupt daily operations for THA staff and residents, clients, and applicants.

Planned Non-Significant Changes: THA will be building out its pre-inspections policies and implementation processes to explore additional changes that may be needed in 2023 to operate pre-inspections effectively. No additional waivers are needed to implement these changes.

Planned Changes to Metrics/Data Collection: THA does not anticipate any changes to metrics and data collection.

Planned Significant Changes: THA does not anticipate any significant changes in the Plan year.

B. NOT YET IMPLEMENTED ACTIVITIES

10. Special Program Vouchers:

Implementation Description: This activity was proposed in 2011 but not yet implemented. The initial idea was to establish a Special Program Voucher program similar to the project-based voucher program. Vouchers were to be awarded to service partners for a special purpose or a special program. The service partners would be responsible for designing the program. This includes selecting households for the program, establishing 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.

Status Update: This activity was proposed before HUD issued guidance on local non-traditional programs. THA now proposes any new activity that is not directly operated by our agency as a separate local non-traditional program activity. No activities are being operated under this activity as of now. There is not a timeline in place to use this activity.

Modifications to the activity since approval: THA does not anticipate any changes to this activity during the Plan year.

C. ACTIVITIES ON HOLD

N/A

SECTION D. 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.

4. Allow Transfers Between Public Housing and Voucher Waitlists This activity was proposed and implemented in 2011. THA created transfers to make it easier for families to move to a unit that better meets their needs. Households on the public housing transfer list can be issued a voucher if there are no units that meet their needs. The activity has made it easier for reasonable accommodation clients to find units that meet their needs. THA's portfolio is almost completely PBV, making this activity obsolete.

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 biennial inspections allowing any PHA to perform them, 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, at 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 has been approved for a RAD conversion in 2014/2015 which caused this activity to be closed out in 2015. The units may be new, rehabilitated, or existing housing. The activity is meant to increase the number of households served and to bring public housing units off of the shelf.

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.

21. Children's Savings Account: This activity was proposed in the 2014 MTW plan and implemented in the fall of 2015 as a pilot within the Salishan community. To date, THA offers children's savings accounts (CSAs) to the children living among all 12 of its managed properties. The program is aimed at developing a savings habit among students and their families and improving graduation rates, college and career preparation and enrollment. The program includes: A partnership with the Washington State 529 Guaranteed Education Tuition (GET) program, as well as post-secondary planning and navigation supports. THA is still operating the Children's Savings Account Program, but under a larger asset building initiative, the Two Generational Program (2Gen). 2Gen provides targeted resources, programming, and staff support to participating children and adults for families that have a child attending middle school or high school. Wrap-around services include social-emotional supports, place-based educational programming, and direct support for families to build assets to improve their economic mobility. Because THA is not utilizing any regulatory waivers to operationalize the Children's Savings Account program, THA will close out the activity but continue reporting on CSA and its larger 2Gen initiative in *Section V: Planned Application of MTW Funding Flexibility*.

Section V: Sources and Uses of MTW Funds

A. Planned Application of MTW Funds

Estimated Sources of MTW Funding for the Fiscal Year		
PHAs shall provide the estimated sources and amount of MTW funding for the Fiscal Year		
SOURCES		
FDS Line Item	**FDS Line Item Name**	**Dollar Amount**
70500 (70300+70400)	Total Tenant Revenue	-
70600	HUD PHA Operating Grants	$53,100,000
70610	Capital Grants	$250,000
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	$ 3,000,000
71100+72000	Interest Income	$ 12,000
71600	Gain or Loss on Sale of Capital Assets	$ -
71200+71300+71310+71400+71500	Other Income	$ 1,046,000
70000	Total Revenue	$ 57,408,000

Estimated Uses of MTW Funding for the Fiscal Year		
PHAs shall provide the estimated uses and amount of MTW funding for the Fiscal Year		
USES		
FDS Line Item	**FDS Line Item Name**	**Dollar Amount**
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	$12,500,000
91300+91310+92000	Management Fee Expense	$ 1,270,000
91810	Allocated Overhead	$ -
92500 (92100+92200+92300+92400)	Total Tenant Services	$ 1,650,000
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	$ 70,000
93500+93700	Labor	$ -
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	$ 380,000
95000 (95100+95200+95300+95500)	Total Protective Services	$ 82,000
96100 (96110+96120+96130+96140)	Total Insurance Premiums	$ 150,000

96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	$ 112,000
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	$ -
97100+97200	Total Extraordinary Maintenance	$ 2,000
97300+97350	Housing Assistance Payments + HAP Portability-In	$ 43,500,000
97400	Depreciation Expense	$ 900,000
97500+97600+97700+97800	All Other Expenses	$ -
90000	Total Expenses	$ 60,616,000

Please describe any variance between Estimated Total Revenue and Estimated Total Expenses:

THA will update this section with the corresponding requirements prior to THA's final submission of the 2023 MTW Plan.

Planned Application of MTW Funding Flexibility

Listed below are some of the specific ways in which THA plans to exercise its MTW flexibility:

- THA is continuing its work with an external consultant to lead the agency in assessing the state of diversity, equity, inclusion, and belonging (DEIB) in its policies, practices, and programs. The consultant will continue to collaborate with staff to articulate a clear set of goals and draft an action plan with specific activities to advance DEIB at THA.

- THA is making changes to relieve the administrative burden on both the agency and the tenants by creating a more streamlined approach to both the certification process and inspections. THA intends to make its processes less intrusive on people with fixed incomes such as the elderly and disabled, and to relieve families from some of the more burdensome requirements of annual certification. The new certification cycle started in 2013.

- THA is focusing on housing, employment-related services, and other case management activities that will move families towards self-sufficiency. Its Client Support and Empowerment Department also assists tenants that are facing challenges in successful tenancy.

- 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. This also encompasses THA's Children's Matched Savings Account Program (formerly reported as Activity 21), which is aimed at developing a savings habit among students and their families and improving graduation rates, college and career preparation and enrollment.

- THA is 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 charge 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 in the community to create local non-traditional housing programs. The programs are funded by THA but run by partnering agencies.

- In response to the tremendous impacts of the COVID-19 pandemic and the economic strain for many households, THA is focusing on eviction prevention efforts to help keep residents who are at-risk of eviction housed. This includes the hiring of an eviction prevention specialist to engage with residents on late rent and entering into affordable repayment agreements and partnering with Pierce County to connect households to local Emergency Rental Assistance funds.

- THA is reassessing its contracting procedures and investing in staff support to ensure equitable contracting and procurement standards are being followed. THA seeks to increase contracts with minority and women-owned business enterprises (MWBE). THA is also focusing on equitable hiring and ensuring there is adequate staff capacity to help accomplish our goal of increasing the number of customers and low-income Tacoma residents hired by THA and its partners (aligned with Section 3 efforts).

- THA is exploring the possibility of initiating a new local homeownership program. THA's new program could include flexibilities to make access to homeownership more equitable and affordable to marginalized populations in Tacoma. These flexibilities could include: down payment assistance; mortgage payment assistance; changes to the payment standard formula; streamlining verification policies; and/or altering any income requirements. THA is considering amending THA's waitlist for access to the homeownership program to prioritize household who experienced or are at-risk of displacement or other alternatives that could address the historical inequities around homeownership access.

Planned Application of PHA Unspent Fund and HCV Funding

Original Funding Source	Beginning of FY - Unspent Balances	Planned application of PHA Unspent Funds during FY	Amount	Time frame
HCV HAP	$6,500,000 - estimated	IT Platform upgrade/switch	$ 2,500,000	2022-2023
		Business Process Improvement	$ 1,000,000	2022-2024
		Faircloth RAD units	$ 1,500,000	2022-2025
		Section 8 HOPP increases	$ 1,500,000	2022-2023
		Maintain 4 months MTW Operating Expense in Reserve (Non-HAP)	$ 5,000,000	In Perpetuity
HCV Admin Fee	$ -			
PH Operating Subsidy	$ -			

Local Asset Management Plan

Is the PHA allocating costs within statute?		or	No
Is the PHA implementing a local asset management plan (LAMP)?	Yes	or	

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

Has the PHA provided a LAMP in the appendix?	Yes	or	

Rental Assistance Demonstration (RAD) Participation

Description of RAD Participation

RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION
• In April 2016, THA closed on the conversion of 456 units. Rehab on those units was completed on 12/31/2017. • Between October 2019 and December 2019, THA closed on the conversion of 323 additional units. This was a transition in which no new Capital Financing was involved. • THA's original significant RAD amendment was submitted to HUD 7/27/2015 and was approved on 9/14/2015.

Has the MTW PHA submitted a RAD Significant Amendment in the appendix? A RAD Significant Amendment should only be included if it is a new or amended version that requires HUD approval.

No

If the MTW PHA has provided a RAD Significant Amendment in the appendix, please state whether it is the first RAD Significant Amendment submitted or describe any proposed changes from the prior RAD Significant Amendment?

N/A

Section VI: Administrative

A. Board Resolution and Certification of Compliance

THA will update this section with the corresponding requirements prior to THA's final submission of the 2023 MTW Plan.

B. Documentation of Public Process

MTW Plan Public Review Process - Summary:

- Public Comment Dates: August 5, 2022 – September 4, 2022
- No public comments received
- Posted on THA's website and social media accounts
- Virtual public hearing was held on August 16, 2022
    - One attendee for the public hearing
    - No comments received

(Image on next page) Notice of Public Comment Period and Public Hearing.

PUBLIC COMMENT

2023 Moving to Work (MTW) Draft Plan

August 5, 2022

The public comment period ended September 4, 2022

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NOTICE OF PUBLIC COMMENT PERIOD & PUBLIC HEARING

The Tacoma Housing Authority (THA) invites residents, voucher holders, partners and community members to comment on our **2023 Moving to Work (MTW) Draft Plan**.

The 2023 MTW Draft Plan outlines the agency's priorities and how we will use our MTW flexibility to serve our participants, community and our partners in 2023.

We will receive comments regarding the 2023 MTW Draft Plan during a 30-day public comment period, August 5, 2022 – September 4, 2022. ***All comments must be received by 5:00 PM on September 4.***

2023 Moving to Work Draft Plan pdf

Download

Leave a Comment on the MTW Plan

You may fill out our online form or contact Christine Nguyen, Planning and Policy Analyst via the options below:

Christine Nguyen

Tacoma Housing Authority

Policy and Planning Analyst

Office: 253-274-5581

Email: cnguyen@tacomahousing.org

You can also mail comments to THA, c/o Christine Nguyen, at 902 S. L Street, Tacoma, WA 98405

Fill Out MTW Plan Survey Online:

The public comment period has ended.

Attend a Public Hearing

You can also attend a virtual public hearing to share your questions and comments:

Virtual Public Hearing for THA's 2023 MTW Plan

Date/Time: Tuesday, August 16, 2022, 4:00 PM – 05:00 PM Pacific Time (US and Canada)

Join online: https://us02web.zoom.us/j/83351260879

Meeting ID: 833 5126 0879

Passcode: 902

Meeting dates, locations, and times are subject to change. Up-to-date information is posted on the Tacoma Housing Authority (THA) website. You may contact the THA office the week prior to the scheduled meeting to confirm this information. The sites are accessible to persons with disabilities. Persons requiring special accommodations should contact Christine Nguyen at 253-274-5581 before 4:00 p.m. the day before the scheduled regular meeting.

Deadline for Comments

All comments must be received by 5:00 PM on September 4, 2022 to be considered. The Tacoma Housing Authority Board of Commissioners will vote on the adoption of this policy on Wednesday, September 28, 2022.

C. Planned and Ongoing Evaluations

THA's Department of Policy, Improvement, and Evaluation (PIE) continually monitors its programs, conducts analyses to inform agency-wide decisions, and evaluates strategies that improve its service delivery. In 2023, THA's PIE department, in conjunction with operational departments, will support the following work:

Operational Improvements: THA will continue working closely with IT to plan for THA's technology conversion, including extensive data cleaning and transformation. Efforts will be largely focused on building the data capacity and infrastructure needed to carry out rigorous evaluation and analyses in the future. THA will also continue to monitor and adjust practices for its waitlist management, implementation of the 2Gen Program, FSS Program, and continued transition of HOP subsidies to HCVs based on analyses conducted by implementation staff.

Payment Standards Analysis: THA's PIE department completes annual and mid-year reviews of its payment standards to ensure they are meeting the needs of participants. THA piloted new methods to conducts its payment standards analysis in 2022 in which THA was able to procure access to an extensive third-party dataset, thereby allowing THA to fine tune its payment standards and adjust to the local market in response to changing market conditions. THA will continue to conduct its annual and mid-year reviews in the 2023 plan year.

Education Systems Change Assessment and Recommendations: THA is working with the Foundation for Tacoma Students (FFTS) to evaluate THA's Education Project, with the intent of adjusting programs to better meet the needs of THA clients and align with FFTS' and Graduate Tacoma's 2030 community-wide goals.

Exploring New Programs & Initiatives: THA continues to explore new programs that are aligned with THA's mission to expand quality, affordable housing to low-income households in Tacoma. Before new programs are launched, THA undergoes a robust analysis and feedback period to identify potential impacts of a new program and relevant measurement criteria. For example, in 2023 THA is exploring the possibility of initiating a new local homeownership program and seeks to conduct analyses to inform how its program will be designed to ensure homeownership access can be more equitable and affordable to marginalized populations in Tacoma.

D. Lobbying Disclosures

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DISCLOSURE OF LOBBYING ACTIVITIES

Approved by OMB
0348-0046

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

1. Type of Federal Action:	2. Status of Federal Action:	3. Report Type:
[b] a. contract b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	[NA] a. bid/offer/application b. initial award c. post-award	[a] a. initial filing b. material change **For Material Change Only:** year _____ quarter _____ date of last report _____

4. Name and Address of Reporting Entity:	5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:
[X] Prime [ ] Subawardee Tier _____, *if known*: **Congressional District**, *if known*: 4c	**Congressional District**, *if known*:
6. Federal Department/Agency: Department of Housing and Urban Development	**7. Federal Program Name/Description:** MTW Annual Plan CFDA Number, *if applicable*: _____
8. Federal Action Number, *if known*:	**9. Award Amount**, *if known*: $
10. a. Name and Address of Lobbying Registrant (*if individual, last name, first name, MI*):	**b. Individuals Performing Services** (*including address if different from No. 10a*) (*last name, first name, MI*):
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.	Signature: April Black Print Name: April Black Title: Acting Executive Director Telephone No.: (253) 207-4474 Date: 9/7/2021
Federal Use Only:	Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)

Appendix A: Letter of Consistency

THA will update this section with the corresponding requirements prior to THA's final submission of the 2023 MTW Plan.

Appendix B: 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 2023 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 have 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 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, all but five Public Housing units had transitioned to RAD units. The five units consists of a single family home owned by THA (AMP6), and four units in our Hillside 1500 tax credit entity. It is important to note we currently manage our properties in our Tax Credit entities, and follows the guidelines set forth by this LAMP.

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 within the THA entity and Tax Credit Management. This allows the agency to see how much it costs to manage its Tax Credit Portfolio versus its other affordable housing programs,. THA considers our Special Purpose Vouchers, Real Estate Development, and grants funded by Non Federal funds as Non-MTW activities with the revenues and expenses falling 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.

Table 3 at 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	

Program Area	Cost Type	Comments
	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.

Administrative 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. Table 2 below shows how these fees are derived. . For Rental Assistance, THA had been using the HUD prescribed Management Fee, but has started deviating based on better understanding the cost of the different departments to support the program For Rental Assistance, THA had been using the HUD prescribed Management Fee, but has started deviating based on better understanding the cost of the different departments to support the program. The Property Management units we manage are almost exclusively Tax Credit properties and their fees are based upon an agreed upon % with our Tax Credit partners and investors in their respective Operating Agreements. We do make decisions as to how we will break those fees down once they are received at THA. THA will reserve the right to use any available excess operating subsidy remaining in any remaining Tax Credit AMP to cover deficits in the Tax Credit PSC. Fees that would be allocated out (leasing, Elderly Services coordinator, IT) are charged as part of the fee in order not to have any expenses allocated out that Property managers do not have any control over.

When we transitioned our PH units to RAD, we also built in a $250 per unit per year fee for Client Support by our THA staff. It is separate from the administrative support fee, and is recorded as revenue by our Client Support and Empowerment department to defray the cost of supporting our managed property clients. This fee indicates the level of support THA has made to help ensure the successful tenancy of our clients.

Administrative Support Fee Components		
Fee	**Rental Assistance**	**Tax Credit**
Management Fee		
Executive	$2.00	$ 2.00
Human Resources	$1.75	$ 2.25
PM O'hd (including rent)	$2.75	Remaining
Bookkeeping Fee	$6.50	$22.50
Asset Management Fee	$0.00	$10.00
IT Fee	$7.50	$10.00
Community Services	$4.50	$ 2.50
Leasing Support		$ 1.50
Total Fee:	***$25.00***	***$50.75***

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 primary source of funds for Property Management includes Tenant Revenue, Housing Assistance Payments, and Other Revenue.

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. In 2021, THA also received vouchers for the EHV and FYI programs. 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. Table 3 below shows the unit equivalencies for THA. These equivalencies are also the basis of THA's allocation scheme for Program Support Fees.

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 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 2022.

Program Support Center Allocation Detail

Table 3: Total units & Program Support unit equivalencies

Program Support Center Unit Equivalencies - 2022 Projected					
Cost Center	**Funding Source**	**CAH (MTW) Unit Equiv.**	**Tax Credit (MTW) Unit Equiv.**	**Business Activities (Non-MTW) Unit Equiv.**	**Total Units**
Rental Assistance	Mod Rehab SR0003			30	30
	Mod Rehab SR0002			41	41
	Section 8 Vouchers	3,543			3,543
	Life Manor TPV Vouchers- Roll into MTW 07/01/12	150			150
	Hillside Terrace Relocation Vouchers	103			103
	Wedgewood - 50 Units managed UMS*	48			48
	Tahoma House	6			6
	EHV			135	135
	FUP Vouchers			125	125
	FYI Vouchers			75	75
	Mainstream Vouchers			78	78
	NHT Vouchers			100	100
	VASH Vouchers			267	267
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
	Salishan 7			91	91
PH Units-THA	AMP 6	1			1
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
3rd Party Managed - 50 % equivalency	Highland Crest - Should be online 1/1/18			36.5	73
	James Center North - Estimate- s/b online 1/1			15	30
	New Look		24		48

	Outrigger Apts.			24.5	49
	Prairie Oaks			7.5	15
	Totals	***4,656***	***1,348***	***1,026***	***6,332***
Real Estate Development	THA MTW Support	238			238
	THA as Developer			713	713
	Development Unit Equivalents - 15% of Total Units	*238*	*0*	*713*	
	Total Units/Unit Equivalents - Agency	***4,894***	***1,348***	***1,739***	***7,981***
Program Support Center Equivalencies (% of All Unit Equivalencies)		***61.32%***	***16.89%***	***21.78%***	

Appendix C: THA's Emergency Operations

As learned through the COVID-19 pandemic THA may need to implement temporary changes to its activities to ensure continuity of operations and respond to the needs of THA staff, participants, and the general public. Emergency Operations may be implemented as needed when an emergency has been declared under national, state, local or Executive order. During that time, THA may use any of the following strategies to respond to the needs of the agency and our clients. They will be implemented as needed and as temporary activities under times of duress. MTW authorizations are provided at the end of this appendix in the *MTW Authorization of Emergency Operations Matrix*.

- **Defer 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 will 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*
- **Extend 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. We propose to push back recertifications by one year that are due during a time of crisis so that households and our staff can focus on immediate needs and health and safety.
    - *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 have to 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. During times of crisis, we propose 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)*

- **Remove 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)*
- **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 propose to 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 will increase its QA inspections and run targeted inspections on units with past of frequent HQS deficiencies.
    - *Related Activity: 25. Modify HQS*

MTW Authorization of Emergency Operations Matrix

Emergency Operation Type	Relevant THA MTW Activities	MTW Authorization (THA Standard MTW Agreement)	Reference to MTW Operations Notice - Appendix I, as applicable	Additional Notes
Defer end of participation dates	• *3. Local Project-Based Voucher Program;* • *17. Housing Opportunity Program (HOP)*	Standard MTW Agreement: Attachment C Section D.2.a. and D.2.d.	7. Term-Limited Assistance. Term-Limited Assistance (HCV) HUD states "the agency [THA] is authorized to implement term limits for families residing in public housing or receiving voucher assistance." (Main description, waiver 7)	THA is authorized to limit term assistance and abides by activity rules during normal operations. During emergency operations THA will amend the time limitation requirement to make it less restrictive for clients by deferring the end of participation.
Extend regular recertification due date	• *5. Local Policies for Fixed-Income Households;* • *6. Local Policies for Work-Able Households*	Standard MTW Agreement: Attachment C Sections C.4 and D.1.c.	3. Reexaminations: Alternative Reexamination Schedule for Households and Self-Certification of Assets. HUD states "the agency [THA] may establish an alternative reexamination schedule for households."	During emergency operations THA will alter its recertification schedule, as allowed through the MTW authorization.
Implement emergency verification policies	• *5. Local Policies for Fixed-Income Households;* • *6. Local Policies for Work-Able Households;* • *7. Local Income and Asset Verification Policy;*	Standard MTW Agreement: Attachment C Section C.4, C.11, D.1.c, D.2.a, D.3.a, and D.3.b	3. Reexaminations: Alternative Reexamination Schedule for Households and Self-Certification of Assets HUD states "the agency [THA] is authorized to implement a reexamination program that differs from the reexamination program currently mandated in the 1937 Act	Per the Standard MTW Agreement, THA is authorized to adopt and implement any reasonable policy for verifying family income and composition and for determining resident eligibility that differ from the currently mandated program requirements. As required by HUD in the 1996 MTW Statute, THA will continue to determine the initial eligibility of the

	• *8. Local Interim Processing and Verification Policies (HCV/PH)*		and its implementing regulations... MTW agencies must continue to determine the initial eligibility of the family in accordance with provisions of 24 CFR 5.609."	family in accordance with HUD's PIH Notice 2018-18 and any subsequent guidance that supercedes.
Remove 90-day and 20% rule requirements	• *8. Local Interim Processing and Verification Policies (HCV/PH)*	Standard MTW Agreement: Attachment C Section C.4, C.11, D.1.c, D.2.a, D.3.a, and D.3.b.	This refers to providing flexibility for a THA-imposed activity, not provided in Appendix I.	THA is authorized to define its own reexamination standards, payment standards and rent levels for tenant-based assistance during normal operations. During emergency operations THA will make its policy less restrictive for clients.
Defer HQS Inspections	• *25. Modify HQS*	MTW Authorization: Attachment C, Section D.5	5. Housing Quality Standards (HQS).d. Alternative Inspection Schedules (HCV. HUD allows PHAs "to develop flexibilities around an HQS inspection's timing and frequency, the independent-entity requirement, and penalties for failing an HQS inspection…"	HUD provides PHAs the ability to set its own schedule for timing and frequency, which includes the flexibilities THA is seeking to establish. Furthermore, these provisions are included in the MTW Standard MTW Agreement.

Resolution 2

TACOMA HOUSING AUTHORITY

RESOLUTION 2022-09-28 (2)

Date: September 28, 2022

To: THA Board of Commissioners

From: April Black
Executive Director

Re: Authorize Investment Institutions and Authorized Signers

This resolution would update the institutions we conduct financial transactions with, along with the signers for the Tacoma Housing Authority.

Background

The annual reorganization, at which a new Board Chair and Vice Chair are elected, necessitates a resolution that authorizes their signatures for the financial institution accounts of the Tacoma Housing Authority.

The resolution replaces Resolution 2021-06-23 (4), which had authorized the staff members as signers for the bank and investment accounts of the Tacoma Housing Authority and identifies the new ones, as well as the authorized THA staff members.

Recommendation

Approve Resolution 2022-09-28 (2) replacing 2021-06-23 (4) authorizing the signers for the financial institutions.

RESOLUTION 2022-09-28 (2)
(Authorized Signers for Financial Institution Accounts)

WHEREAS, The Board selects its chair and vice chair at its annual meeting. When these Board officers change, THA needs a resolution changing the authorized signatures for its accounts at its various financial institutions; and

WHEREAS, This resolution does that and replaces Resolution 2021-06-23 (4), which had authorized previous officers as signers; and

WHEREAS, The Board of Commissioners needs to formally authorize the financial institutions and the authorized signers on the accounts; now, therefore, be it

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

The funds of THA are hereby authorized by the laws of the State of Washington and the regulations of the Department of Housing and Urban Development to be utilized, held and invested and that said funds may be deposited with any or all of the following institutions:

BANK OF AMERICA
BANNER BANK
HERITAGE BANK
KEY BANK
J.P. MORGAN CHASE BANK
U.S. BANK
THE BANK OF NEW YORK MELLON TRUST CO.
WASHINGTON STATE INVESTMENT POOL

Or such other institutions as may be found to provide the highest interest rate and/or are beneficial to THA's operational goals.

Be it further resolved that any of the below designated individuals are authorized to enter into any and all transactions relating to the above-mentioned institutions as they exist now or may be created in the future upon signature of any two (2) of the following designated individuals:

Shennetta Smith	Chair _____
Dr. Minh-Anh Hodge	Vice Chair _____
April Black	Executive Director _____
Jorge Perez	Director of Finance _____
Duane Strom	Comptroller _____

Be it further resolved that this resolution replaces any and all previous resolutions designating authorized financial institutions.

Be it further resolved that the authorized signers acknowledge and accept Heritage Bank's policy of accepting any check with one authorized signature.

Approved: September 28, 2022

_____
Shennetta Smith, Chair