

PHILADELPHIA HOUSING AUTHORITY



MOVING TO WORK ANNUAL REPORT

**PHA FISCAL YEAR 2024
APRIL 1, 2023 - MARCH 31, 2024**

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I. INTRODUCTION

The Moving to Work Annual Report provides information on activities undertaken by the Philadelphia Housing Authority (PHA) under the Moving to Work Demonstration Program (MTW) during Fiscal Year 2024, i.e., the period from April 1, 2023 to March 31, 2024. The format and required content of the Report are defined by the U.S. Department of Housing and Urban Development (HUD) in the applicable version of HUD Form 50900.

PHA has been an MTW agency since April 2001. The MTW Agreement as amended, which has a term that has been recently extended through 2038, describes the authorities granted to PHA under MTW and the requirements for participation. MTW is a demonstration program authorized by Congress, through which PHA and other participating agencies are given the flexibility to waive certain statutes and HUD regulations in order to design and test approaches for providing housing assistance that address one or more of the following MTW statutory objectives:

- 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.

The MTW Agreement allows PHA to combine its three (3) primary HUD funding sources (Public Housing Operating Fund, Capital Fund and Housing Assistance Payments) and utilize them flexibly and interchangeably for any MTW authorized purpose.

A. MTW Long-Term Goals and Objectives

The flexibility afforded to PHA by its MTW designation has a positive and consequential impact on virtually every area of PHA policy and operations. PHA's MTW status has helped to build and sustain innovative partnerships and leverage substantial additional funds in support of PHA and the City of Philadelphia's neighborhood revitalization and housing preservation efforts citywide.

PHA's housing preservation and neighborhood revitalization efforts support the goals established in the Assessment of Fair Housing (AFH) Plan jointly issued by the City and PHA and accepted by HUD in February 2017 and further updated in FY 2023. These goals emphasize the importance of a balanced approach to fair housing including preservation of existing housing, development of new affordable rental and homeownership housing, investments to improve the quality of life in distressed neighborhoods, and mobility initiatives to support housing in high opportunity areas.

PHA views the use of MTW funding and regulatory flexibility as an essential component to implement the long-term goals and objectives detailed in the Board-approved Strategic Directions Plan described in the FY 2015 MTW Annual Plan.

B. MTW Initiatives and Accomplishments

Throughout the past year, PHA continued a productive collaboration with the City of Philadelphia, a diverse and broad array of neighborhood partners and other stakeholders to increase the supply of affordable housing, preserve existing affordable units, and revitalize and transform neighborhoods in and around distressed public housing developments.

The activities summarized below involve the use of MTW funding and/or programmatic flexibility. PHA's development and neighborhood revitalization initiatives leverage MTW funds to secure private equity, City, State and/or other non-PHA funds.

Sharswood/Blumberg

PHA is nearing the completion of the Choice Neighborhoods Transformation Plan for Sharswood/Blumberg, the largest mixed-income, mixed-use redevelopment project underway in the City of Philadelphia. Funded in part by a \$30 million HUD Choice Neighborhoods Implementation grant, the current, revised Plan calls for the development of nearly 1,500 units of mixed-income housing, including affordable rental and homeownership units.

As of FYE 2024, a total of 576 rental and 29 homeownership units have been completed. An additional 659 rentals and 236 homeownership units are currently under construction or about to start construction in development phases undertaken directly by PHA or through developer partnerships.

The project has catalyzed Sharswood's revitalization, including the development of the new \$52 million mixed used (retail and housing) Sharswood Ridge complex adjacent to PHA's new headquarters building. Developed with PHA's support by an MBE firm (Mosaic), Sharswood Ridge's first major tenant – a fresh foods Grocery Outlet – opened in July 2022 and celebrated a successful first year in 2023. This represents the first supermarket to be opened in the neighborhood in over 50 years. The remaining housing components of Sharswood Ridge were completed in FY 2024.

In addition to housing and retail development, the Vaux School was rehabilitated and repurposed into a community facility with a high school operated by Big Picture Philadelphia, PHA's Workforce Center, PHA Section 3 Resource Center and other training programs and services; development of a new PHA headquarters building; and, numerous other neighborhood improvements. PHA also launched a new Youth and Family Center at the PHA Ridge Avenue headquarters in October 2022, which had its first full year of operations in 2023. As part of the CNI grant, PHA has directed and overseen implementation of an array of employment, health care, early childhood and other programs at Sharswood that have leveraged foundation, government, and other funding and resulted in extensive benefits to public housing and neighborhood residents.

North Central/Norris

As noted in the FY 2023 MTW Report, the Choice Neighborhood Transformation Plan for North Central/Norris was successfully completed in collaboration with the City, resulting in extensive community improvements and construction of 272 rental units, 30 homeownership units, and a community center. In FY 2024, PHA continued pre-development work and planning for additional

housing units on the former public housing site. PHA also continued to serve as the People Lead Partner in FY 2024 and will continue to oversee endowment-funded service activities through the remainder of the endowment period which is anticipated to end in FY 2025.

West Park Apartments

Following an intensive community engagement and planning process, PHA is undertaking the complete redevelopment of West Park Apartments, an 11-acre, 327-unit Public Housing development into a mixed-income, mixed-use neighborhood of choice with 1,000 housing units, of which 600 will be targeted for households earning up to 60% of AMI. In FY 2024, the PHA Board approved the selection of development partners, LMXD and MSquared, and approved the plan for West Park, which involves the substantial rehabilitation of three (3) existing high-rise towers, new construction of a mid-rise building for seniors, and the development of low-rise apartment buildings and new family townhomes throughout the site and on adjacent lot. Ground floor commercial spaces will be incorporated into the development plan along with extensive site reconfiguration, infrastructure improvements, new streets, and a new gateway to Market Street. PHA and its partners commenced design work on the site and submitted a 9% and two 4% LIHTC applications to PHFA for the first 325-unit phase. Progress was also made on a 9% and 4% LIHTC applications for Phase 2, which includes 675 units. PHA worked with the City and development team to prepare and submit a competitive \$50 million Choice Neighborhoods Implementation (CNI) grant application to HUD. The project was one of nine (9) finalists nationwide recently announced by HUD. If awarded, the grant will leverage over \$500 million in housing, neighborhood improvements, and supportive services funding.

Bartram Village/Kingsessing

In FY 2024, PHA was awarded a \$50 million Choice Neighborhoods Implementation grant for Bartram Village and the surrounding Kingsessing neighborhood, building on an earlier 9% LIHTC award for Phase 1. The original plan calls for the replacement of all 500 distressed public housing units at on and offsite locations with 608 mixed income units; however, PHA is currently revising the plan to increase the overall number of housing units to up to 733 based on feedback from HUD. Design work on the first Bartram Village offsite phase was completed in FY 2024 and substantial progress made towards the planned FY 2025 closing and subsequent construction start.

Fairhill Apartments

PHA continued to plan for the complete redevelopment of the Fairhill Apartments public housing development in multiple on and off-site phases. The redevelopment plan calls for the preservation of two existing family high-rise towers and rehabilitation to 202 units of senior housing; the remaining low-rise units will be demolished and replaced with 150 new townhomes at on-site and nearby off-site locations to be acquired by PHA. In addition to major reconfiguration of the site and street layout, the nearby Hartranft Community Center (for which ownership has transferred from the City to PHA) will be rehabilitated with a neighborhood swimming pool and other amenities. To date, PHA has completed design work for the first two phases; acquired and began rehabilitation of the Community Center; begun the process of acquiring offsite properties; commenced demolition; selected a development contractor for Phase 2 (the Phase 1 development contractor was selected in 2022); and, submitted 4% LIHTC applications for both phases. PHA expects to close both transactions and commence construction later in FY 2025 subject to the award of tax credits.

Rental Assistance Demonstration (RAD)

The RAD program allows PHA to leverage MTW funds, private and other capital sources through conversion of public housing subsidies to long-term project-based assistance. RAD is a critically important component of PHA's efforts to secure new capital resources necessary for the long-term preservation of PHA's existing multifamily public housing portfolio. RAD also supports PHA's efforts to transfer subsidies from distressed, vacant scattered site public housing units to newly developed affordable housing. As of the end of FY 2024, PHA has closed on 2,162 rental units at 34 developments sponsored by PHA and partner organizations that will serve veterans, seniors, formerly homeless families and other underserved, diverse populations while also helping to catalyze additional public and private sector investments into neighborhoods.

Harrison Plaza

After a \$47.7 million substantial rehab utilizing 4% LIHTC, construction work on the Harrison Plaza Tower was fully completed and the building was reoccupied in FY 2024 after conversion to project-based assistance under the RAD program. Building on this accomplishment, PHA applied for and was awarded a competitive \$500,000 Choice Neighborhoods Planning Grant in FY 2024 to develop a comprehensive transformation plan for Harrison Plaza's low-rise units and the surrounding Yorktown neighborhood.

Public Housing Development

This initiative allows PHA to tap into existing, but unused, public housing Annual Contributions Contract (ACC) authority to help spur the development of new affordable housing. In FY 2024, construction was completed on seven (7) new public housing developments, consisting of 275 units. PHA is also collaborating with development partners on an additional 12 new public housing developments, which were still under development as of the end of the fiscal year. Pursuant to PHA's FY 2024 MTW Plan, some or all of these new developments will be converted to project-based assistance under Faircloth-to-RAD.

Citywide Development

Over the course of the fiscal year, PHA provided long-term subsidy to over 4,476 housing units at 160 developments throughout the city through the Unit Based Voucher (UBV) program. Development sponsors include dozens of mission-driven and other organizations, including Liberty Resources, New Courtland, HACE, Nueva Esperanza, Women's Community Revitalization Project, Mission First Housing Group, HELP USA, Methodist Family Services, and others. In FY 2024, PHA entered into Agreements and/or Housing Assistance Payments Contracts for 246 new units at seven (7) developments. UBV is increasingly a major catalyst for new affordable development in Philadelphia, as it provides long-term operating supports necessary to ensure that rents are affordable to households with incomes at or below 50% of Area Median Income.

During FY 2024, planning continued for collaborative partnerships with private and nonprofit affordable housing developers to safeguard long-term affordable housing development in targeted areas of Philadelphia by transferring vacant properties for redevelopment. A 20-year restrictive covenant will ensure that the properties will be redeveloped as long-term affordable housing.

Leased Housing

In FY 2024, PHA provided rental subsidies to over 21,000 low-income households consisting of families with children, seniors and people with disabilities through its local Leased Housing Program including MTW and non-MTW vouchers. Households served through the UBV program are included in this total.

PHA continued to develop and implement initiatives to streamline leasing and inspections, increase owner participation, and improve customer service including providing financial incentives to owners to encourage leasing of new HCV units and to retain owners currently participating in the HCV program who lease units in opportunity neighborhoods.

Affordable Homeownership

PHA operates a broad array of first-time affordable homeownership initiatives designed to expand housing choice and increase the number of first-time, low-income homebuyers. Through these initiatives, a total of 49 public housing and HCV families became new homeowners in FY 2024. To further equitable development efforts and increase affordable homeownership opportunities for PHA families, PHA continued its partnership with Jumpstart Philly to support local aspiring developers and renovate vacant and distressed scattered site units for affordable homeownership. In FY 2024, developers commenced renovations on the second and third cohorts, 34 scattered site units in all. Seventeen (17) of the scattered sites units are complete, of which seven (7) have been sold to qualifying low-income families, and the remaining 17 units are under construction.

Resident Supportive Service Programs

PHA works directly with residents through the Resident Programs and Partnerships (RPP) Division and their Workforce Center, Section 3 Resource Center and Job Bank, and the Youth and Family Center, which opened its doors in FY 2023. PHA also continued to collaborate with a network of partners, who have demonstrated a long-standing commitment to serving PHA's residents. For detailed information on the programs and services offered to PHA residents through RPP and its partners, see Table 21: Resident Services Program Summary for FY 2024.

PHA continued to utilize MTW funds and other partner-leveraged funds to support extensive workforce development, adult and youth education, financial literacy, senior service, health care and other programs and services to meet the needs of PHA residents. The examples below highlight how PHA leverages funding to broaden the reach of programs and services:

- **Choice Neighborhoods Social and Human Services.** RPP leads the People Team for PHA's Kingsessing-Bartram Village and Sharswood-Blumberg Choice Neighborhoods, providing case management, service coordination and social, educational, employment and health services to residents of these communities. In FY 2024, the People Team at Sharswood-Blumberg provided outreach, case management and/or service coordination to over 90% of target households. To serve Sharswood-Blumberg and other PHA residents, PHA leverages space at the Vaux Community building, which is also the home of RPP's Workforce Center, to encourage partners to deliver programs and services on-site, including an indoor farming and food entrepreneurship start-up and counseling agency in

FY 2024. PHA also worked to establish its People Team for Kingsessing-Bartram Village after receiving a \$50 million Choice Neighborhood Implementation grant in FY 2024.

- **Youth & Family Center.** Conveniently located at PHA Headquarters, the Youth & Family Center brings all of PHA’s programs for expecting parents and young people ages 0 through post-secondary under one roof. In FY 2024, PHA completed hiring and onboarding for the Youth & Family Center team, which includes staff focused on family enrichment, early childhood, and youth programs. At the Center, RPP and the Youth & Family Center continued long-standing youth initiatives including afterschool and summer youth programs in partnership with the Boys & Girls Club, Mighty Writers, the DREAM Program Inc., and North Central Resident Council. Other initiatives included the Summer WorkReady program in partnership with the City of Philadelphia and the PHA Youth Ambassadors program for PHA youth to participate in weekly programming with the Resident Advisory Board. The Center also introduced new initiatives in FY 2024, including services and support to ensure that PHA youth are ready for the transition to college, providing first-generation college students with the supplies they need for their first year and hosting workshops on financial aid and scholarship opportunities. Supporting children of all ages, the Center has also been named as a partner site in the joint HUD-National Book Foundation “Book Rich Environments” initiative, which saw major publishers donate over 30,000 books to PHA families in FY 2024. Through the Center, PHA also provided over 620 school-age residents with book bags and school supplies before the start of the 2023-2024 school year and hosted PHA’s annual holiday toy drive and giveaway benefitting over 380 children in 145 families.
- **Grandparents Grant from the William Penn Foundation.** In FY 2024, PHA completed the second year of administering a three-year Kinship Care Coordination grant from the William Penn Foundation at the Youth & Family Center, piloting a program serving PHA grandparents raising their grandchildren, with supplementing funds from the Brookdale Foundation. The grant funds a range of supportive services for PHA grandparents raising their grandchildren, including case management, resources and referrals, peer support groups, outreach and education, and emergency funding for basic needs.

Re-Entry Initiatives

PHA continued implementation of the MTW Second Chance program, which provides supportive services and housing subsidies to formerly incarcerated returning citizens that are active participants in good standing with the Eastern District Federal Court Supervision to Aid Reentry (STAR) Program and Mayor’s Office of Reintegration Services (RISE) Program. The program assisted 13 participants in FY 2024, who received housing, counseling, education, job training and placement services. Through this partnership, Second Chance helps to prevent homelessness and, hopefully, interrupt the cycle of recidivism.

Blueprint to End Homelessness Initiative

PHA continued to provide housing opportunities for homeless individuals and other hard to serve special populations, building on and enhancing the ongoing collaboration between the City and PHA to reduce homelessness through the “Blueprint to End Homelessness” initiative. See also Emergency Housing Voucher discussion.

Sponsor Based Shared Housing Pilot

In FY 2024, PHA provided housing opportunities to 60 participants in 39 units through partnerships with the City, which serves homeless and other hard to serve populations, and the Community College of Philadelphia (CCP), which serves low-income, at-risk CCP students.

Voucher Holder Mobility

PHA started a Housing Opportunity Program (HOP) in August 2013 to assist voucher holders in locating units and prospective property owners in opportunity neighborhoods within and outside of Philadelphia. The program provides participants with a broad range of supportive services, housing counseling, and other support for their successful transition to higher opportunity neighborhoods. Through the HOP program, PHA also works with new and potential owners whose units are located in opportunity neighborhoods. As a result, 60 families successfully leased up in high-opportunity neighborhoods through support from the HOP program in FY 2024. PHA also continued to provide owner incentives intended to encourage owners to lease their units in opportunity neighborhoods to HCV participants in order to increase the supply of units available to voucher holders.

Rent Simplification

PHA continued to implement previously approved MTW initiatives that simplify program administration and provide incentives for economic self-sufficiency.

C. Non-MTW Initiatives and Accomplishments

The following are highlights of PHA's non-MTW initiatives and accomplishments in FY 2024. Non-MTW initiatives are those activities that do not generally require the use of MTW regulatory or financial flexibility:

Small Area Fair Market Rents

PHA utilizes Small Area Fair Market Rents (SAFMRs) to establish payment standards for the HCV tenant-based program, which allows PHA to establish multiple HCV payment subsidy standards at the zip code level, instead of utilizing single payment standards for the entire City. Adoption of SAFMRs is projected, over time, to assist HCV program participants to move from areas with high concentrations of poverty to higher opportunity areas that have better access to jobs, education, and other services. PHA also provided resources to voucher-holders and financial incentives to owners to overcome barriers and encourage leasing in higher opportunity areas.

Veterans Administration Supportive Housing

PHA continued its partnership with the Department of Veteran's Affairs (VA) to serve veterans, through the Veterans Administration Supportive Housing Program (VASH) program. The program provides rental assistance for homeless veterans through HUD funding and offers case management and clinical services through the VA. In FY 2024, PHA served 710 veterans through the VASH tenant-based and project-based programs.

Mainstream Vouchers

In FY 2024, PHA provided housing assistance to 431 non-elderly persons with disabilities with Mainstream vouchers. PHA continued its partnerships with the City of Philadelphia Office of Homeless Services and Liberty Resources to provide case management and support for Mainstream voucher holders.

Foster Youth to Independence Vouchers

PHA worked in collaboration with the Philadelphia Department of Human Services to administer Foster Youth to Independence vouchers. In FY 2024, PHA provided housing assistance to 85 individuals under the age of 25 who were homeless or at-risk of homelessness and who have a history of involvement in the child welfare system.

Emergency Housing Vouchers

PHA continued to provide housing assistance to families experiencing or at-risk of homelessness, including those fleeing domestic violence, through the Emergency Housing Voucher (EHV) program. PHA partners with the Philadelphia Office of Homeless Services for the Philadelphia Continuum of Care (CoC), which has committed to providing applicant referrals, housing search and other services to EHV voucher holders. In FY 2024, PHA served 669 families through the EHV program.

Jobs Plus at Wilson Park

In FY 2024, PHA completed its second year of its four-year implementation period for the Jobs Plus program at Wilson Park. To date, PHA has assisted 260 residents and enrolled 225 of these residents in the Jobs Plus Earned Income Disregard (JPEID) rent incentive; residents have saved over \$45,000. With support from Jobs Plus staff, the employment rate at Wilson Park has risen from 26% to 33%.

II. GENERAL OPERATING INFORMATION

A. Housing Stock Information

PHA is the fourth largest Public Housing Authority in the United States and the largest provider of affordable housing in the City of Philadelphia. PHA serves eligible low-income households through its two (2) primary housing programs: Public Housing and the Housing Choice Voucher (HCV) program both of which are supported with MTW funds.

Public Housing

The public housing inventory includes affordable rental units for families, seniors, and persons with disabilities, located throughout the City in conventional public housing developments; Low Income Housing Tax Credit (LIHTC) developments managed by the Philadelphia Asset and Property Management Corporation (PAPMC); and developments operated by Alternate Management Entities (AME) under contract to PHA. Approximately 3,900 of PHA's public housing units are "scattered sites," i.e. housing units located in single family homes or multi-unit buildings. PHA operates one of the largest scattered site public housing programs in the country.

PHA's public housing portfolio is aging and deteriorating. More than 75% of all units were built over 40 years ago and over 55% were built 60 or more years ago. PHA's capital needs backlog continues to grow each year, creating enormous maintenance challenges. In FY 2024, PHA began implementation of a comprehensive asset repositioning strategy with the goal of preserving and expanding the affordable housing portfolio through RAD conversions, Section 18 dispositions, Faircloth-to-RAD development and other initiatives.

Table 1 below provides PHA's actual public housing inventory as of the end of FY 2024. The public housing inventory varies from year to year as a result of public housing units being converted to long-term project-based assistance under the RAD program and other factors including development of new public housing developments.

Table 1: Public Housing Inventory

	Units as of 3/31/2024
MTW Public Housing Units	12,900 (approx.)

PHA is one of the few agencies nationwide to continue to develop public housing units in collaboration with well-qualified, primarily mission-driven housing partners. This activity allows PHA to tap into existing, but unused, public housing Annual Contributions Contract (ACC) authority to help spur the development of new affordable housing. In FY 2024, PHA completed construction on seven (7) new public housing developments, consisting of 275 new units. PHA continued to collaborate with its developer partners on an additional 560 Public Housing units at 12 developments. Pursuant to PHA's FY 2024 MTW Plan, a majority of these developments will be converted to project-based assistance prior to or following initial occupancy under the Faircloth-to-RAD initiative.

Housing Choice Voucher Program

Through the Housing Choice Voucher (HCV) program, PHA provides rental assistance to families, seniors and persons with disabilities at properties owned by private or non-profit owners. The HCV program also provides support to first-time homebuyers. PHA supports HCV program participants in their efforts to find good quality housing units, including housing located in high opportunity areas, through the Housing Opportunity Program.

PHA's voucher inventory includes MTW tenant-based vouchers, project-based vouchers supported through PHA's Unit Based Voucher (UBV) program, as well as vouchers authorized by HUD for special purposes such as the Veterans Affairs Supportive Housing (VASH) Program, Family Unification Program, SRO for the Homeless, Moderate Rehab, Mainstream, Emergency Housing Voucher and Foster Youth to Independence programs. The MTW voucher inventory also includes vouchers issued as a result of conversion of public housing assistance through the Rental Assistance Demonstration program. PHA partners with a wide array of mission-driven, non-profit and for-profit organizations to provide quality housing opportunities, many of which provide site or neighborhood-based supportive services, through the UBV program.

HUD periodically issues Enhanced Vouchers and Tenant Protection Vouchers for PHA to administer. As allowed by the MTW Agreement, PHA incorporates Enhanced and Tenant Protection Vouchers into the MTW program when eligible.

i. Actual New Project Based Vouchers

As of March 31, 2024, PHA has entered into Agreements and/or Housing Assistance Payments Contracts for 246 new project-based voucher units under PHA's Unit Based Leasing (UBV) program, including planned RAD conversions. Due to development financing and construction timetables, projects may appear on this list over more than one year. A list of these projects and summary descriptions is shown in Table 2 below.

Table 2: Actual New Project Based Vouchers

Property Name	# of Vouchers to be Project-Based		RAD?	Description of Project
	Planned	Actual		
Amor	8	0	No	New construction in the Hunting Park neighborhood sponsored by Esperanza.
Compassion Senior Living	38	0	Yes	New construction in the Cobbs Creek neighborhood for seniors. Sponsored by Compassion Senior Living. Supportive services provided.
Father Augustus Tolton (Eastwick)	45	0	Yes	New construction in the Eastwick neighborhood for seniors. Sponsored by Catholic Housing and Community Services.

Property Name	# of Vouchers to be Project-Based		RAD?	Description of Project
	Planned	Actual		
Harlan Street	22	0	No	New construction in the Sharswood neighborhood sponsored by Michaels Development.
Janney Apartment	29	29	Yes	New construction in the Richmond neighborhood sponsored by Human Good.
Kearsley	0	30	No	Existing development for veterans in Wynnefield sponsored by Tryko.
Liddonfield	150	0	No	New construction for seniors in Northeast Philadelphia sponsored by New Courtland. Supportive services are provided.
New Courtland at Henry Ave	40	0	Yes	Rehabilitation of Henry Ave tower for seniors sponsored by New Courtland. Supportive services to be provided.
Old First House	34	34	Yes	New construction of permanent supportive housing for formerly homeless individuals. Sponsored by Community Ventures.
Fairhill Apartments Phase 1	131	0	Yes	Partial conversion of existing public housing development sponsored by PHA.
Queen Row	43	0	Yes	Conversion of existing public housing development sponsored by PHA.
Sharswood Hunt II	30	30	Yes	New construction in the Sharswood neighborhood sponsored by Hunt. Supportive Services to be provided.
Sharswood Hunt III	101	0	Yes	New construction in the Sharswood neighborhood sponsored by Hunt.
Sharswood Phase 4a	58	58	Yes	New construction in the Sharswood neighborhood sponsored by PHA.
Sharswood Phase 6a	0	65	Yes	New construction in the Sharswood neighborhood sponsored by PHA.
Strawberry Mansion Village	34	0	No	New construction in the Strawberry Mansion neighborhood sponsored by Pennrose. Supportive services to be provided.
West Park Apartments Phase 1A	110	0	Yes	Partial conversion of existing public housing development sponsored by PHA.
	873	246	Planned Total Vouchers to be Newly Project-Based	

Describe differences between the Planned and Actual Number of Vouchers Newly Project-Based:

The number of actual new project-based vouchers was less than planned, as several new construction and rehabilitation properties which PHA planned to project-base in FY 2024 were not yet under AHAP or HAP for various reasons including construction and/or financing delays and other factors.

ii. Actual Existing Project Based Vouchers

In addition to the committed projects listed in Table 2, PHA continued to provide subsidies and programmatic oversight to 4,476 existing UBV units. Table 3 provides a list of existing UBV

projects and summary descriptions, including information on actual unit counts as of March 31, 2024, compared to those projected in the FY 2024 MTW Annual Plan.

Table 3: Actual Existing Project Based Vouchers

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
1315 North 8th Street	25	25	Leased/Issued	Yes	New construction targeted for youths aging out of foster care in the West Poplar neighborhood (homeless) sponsored by Project HOME. Supportive services are provided.
2415 N Broad St	88	88	Leased/Issued	Yes	New construction in North Philadelphia serving homeless individuals, sponsored by Project Home. Supportive services are provided.
27th & Susquehanna	78	78	Leased/Issued	Yes	New construction in Strawberry Mansion for low-income families sponsored by Susquehanna Net Zero Housing LP.
4050 Apts	20	20	Leased/Issued	No	New construction for income-eligible artists in West Philadelphia sponsored by People's Emergency Center. Supportive services are provided.
46th St	4	4	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
4th & Diamond	32	32	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
7th & Ritner	0	0	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided. Development was sold since last Plan.
810 Arch St	70	70	Leased/Issued	No	New construction development for Homelessness in Center City Philadelphia sponsored by Project Home. Supportive services are provided.
Academy Rd	18	18	Leased/Issued	No	Existing site for low-income families in Roxborough section of Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Anna's House	12	12	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Arch V Temple	49	49	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					by Mission First Housing Group. Supportive services are provided.
Arch VI Temple	40	40	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Arch VII LIH Walnut	14	14	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Art Apartments	30	30	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Pine Lake Management Associates, LP.
Ascension Manor	3	3	Leased/Issued	No	Existing site for low-income seniors in North Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Belmont I	25	25	Leased/Issued	No	New construction site for the disabled in West Philadelphia sponsored by Inglis House. Supportive services are provided.
Belmont II	15	15	Leased/Issued	No	New construction site for the disabled in West Philadelphia sponsored by Inglis House. Supportive services are provided.
Benner/Frankford	8	8	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Bernice Elza	6	6	Leased/Issued	No	New construction development for homeless emancipated teens in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.
Bethesda Project Bainbridge	20	20	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by Bethesda Project. Supportive services are provided.
Bethesda Project South	4	4	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by Bethesda Project. Supportive services are provided.
Bethesda Project Spruce	13	13	Leased/Issued	No	Existing site for homeless/mental health individuals in South Philadelphia sponsored by Bethesda Project. Supportive services are provided.
Bigham Place	7	7	Leased/Issued	No	New construction development for homeless families in Mantua sponsored by People's Emergency Center. Supportive services are provided.
Blakiston St	7	7	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					Mission First Housing Group. Supportive services are provided.
Blumberg	6	0	Leased/Issued	No	New construction for low-income families in North Phila sponsored by Philadelphia Housing Authority.
Blumberg 83 Phase III	83	83	Leased/Issued	Yes	New construction in Blumberg/Sharswood neighborhood serving low-income families sponsored by PHA.
Blumberg Phase I	51	51	Leased/Issued	Yes	New construction in Sharswood neighborhood serving low-income families including 51 RAD and 6 other project-based vouchers sponsored by PHA.
Blumberg Phase I	6	6	Leased/Issued	No	New construction in Sharswood neighborhood serving low-income families including 51 RAD and 6 other project-based vouchers sponsored by PHA.
Blumberg Senior	94	94	Leased/Issued	Yes	Substantial rehab of an existing site for seniors sponsored by PHA. Supportive services are provided.
Boriquen	17	17	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Boriquen Associates II Limited. Supportive services are provided.
Brentwood Parkside	22	22	Leased/Issued	No	Existing site for very low-income seniors and families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Cantrell Place	40	40	Leased/Issued	Yes	Substantial rehabilitation development in South Philadelphia for seniors, sponsored by Presbys Inspired Life. Supportive services are provided.
Casas En La Plaza	29	29	Leased/Issued	Yes	Rehabilitation of existing family units in North Central Philadelphia, sponsored by Norris Square Community Alliance.
Centennial Village	23	23	Leased/Issued	No	New construction for low-income families, seniors, disabled in West Philadelphia sponsored by Community Ventures. Supportive services are provided.
Chatham Court Apts	18	18	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Ingerman. Supportive services are provided.
Chestnut St	6	6	Leased/Issued	No	Existing site for low-income families in the West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Cloisters III	18	18	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Cloisters III Housing Partnership. Supportive services are provided.
CNI Norris/North Central Phase III	28	28	Leased/Issued	Yes	New construction replacement of existing family public housing site sponsored by PHA.
Conklin St	3	3	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Courtyard at Riverview	470	470	Leased/Issued	Yes	Rehabilitation of existing housing serving low-income families and seniors, sponsored by Michaels Organization.
Dignity Boss	8	8	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown/Mt Airy sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity Nedro	4	4	Leased/Issued	No	Existing site for women and children domestic violence victims in Northwest Philadelphia sponsored by Community For Dignity & Fairness. Supportive services are provided.
Dignity-1	10	10	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-15	4	4	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-21	11	11	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-33	16	16	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Dignity-4	3	3	Leased/Issued	No	Existing site for women and children domestic violence victims in Germantown, sponsored by Community For Dignity & Fairness Supportive services are provided.
Ditman St	10	10	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					Mission First Housing Group. Supportive services are provided.
Dunlap School	35	35	Leased/Issued	No	Existing site for seniors in North Philadelphia sponsored by Dunlap Management Partners LP. Supportive services are provided.
Edgewood Manor	33	33	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Edgewood Manor II Lap. Supportive services are provided.
Elders Place I	43	43	Leased/Issued	No	Existing senior site in Germantown sponsored by Penn Housing LLC. Supportive services are provided.
Elders Place II	38	38	Leased/Issued	No	Existing senior site in Germantown sponsored by Penn Housing LLC. Supportive services are provided.
Fattah Homes I	6	6	Leased/Issued	No	New construction development for homeless families with disability in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.
Fattah Homes II	6	6	Leased/Issued	No	New construction development for homeless families in Mantua sponsored by People's Emergency Center. Supportive services are provided.
Fourth St Access	24	24	Leased/Issued	No	Existing site for low-income families in North Philadelphia. Project sponsor is Mission First Housing Group. Supportive services are provided.
Francis House	10	10	Committed	No	New construction for seniors in Northeast Philadelphia sponsored by St Ignatius. Supportive services are provided.
Francisville East	10	10	Committed	No	Existing project in the Francisville area at 1703-20 Edwin Walk, 1747 Wyle St and 874 Perkiomen St for low-income seniors and families sponsored by Community Ventures.
Francisville Village	10	10	Committed	No	Existing project in the Francisville area at 1504-25 Poplar St for low-income families sponsored by Community Ventures.
Freedom Village	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Freedom Village LP.
Gaudenzia Shelton Court	13	13	Leased/Issued	No	Existing site for homeless low-income individuals in the East Oak Lane section of Philadelphia sponsored by Gaudenzia Foundation Inc. Supportive services are provided.
Gaudenzia Thompson St	6	6	Leased/Issued	No	Existing site for homeless low-income individuals in the North Central section

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					of Philadelphia sponsored by Gaudenzia Foundation Inc. Supportive services are provided.
Gordon St	21	21	Leased/Issued	No	New construction for low-income families sponsored by Philadelphia Housing Authority.
Haddington III	48	48	Leased/Issued	Yes	New construction in West Philadelphia for low-income families, sponsored by 1260 Housing Development Corp. Supportive services are provided.
Harrison Plaza Senior Tower	112	116	Leased/Issued	Yes	Conversion of tower in existing public housing development sponsored by PHA. (4 units are non-RAD)
Help I	14	14	Leased/Issued	No	New construction development for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
Help II	50	50	Leased/Issued	No	New construction development for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
HELP IV	15	15	Leased/Issued	No	New construction development for veterans in West Philadelphia sponsored by HELP USA. Supportive services are provided.
HELP V	37	37	Leased/Issued	Yes	New construction in Northern Liberties section of Philadelphia serving veterans and senior veterans, sponsored by HELP USA. Supportive services are provided.
Hope Bridge Ogden	4	4	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Hope Bridge Vine St	20	20	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes I	24	24	Leased/Issued	No	Existing site for homeless families in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes II	6	6	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes III	6	6	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					Philadelphia. Supportive services are provided.
Imani Homes IV	8	8	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Imani Homes V	11	11	Leased/Issued	No	Existing site for homeless individuals in West Philadelphia sponsored by Methodist Family Services of Philadelphia. Supportive services are provided.
Impact Veterans	8	8	Leased/Issued	No	Existing site for Veteran Families in North Philadelphia sponsored by Impact Services. Supportive services are provided.
INB Mascher	12	12	Leased/Issued	No	New construction for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
Inglis House	17	17	Leased/Issued	No	Existing site for the disabled sponsored by Inglis House. Supportive services are provided.
Inglis House-Elmwood	40	40	Leased/Issued	No	Existing site for the disabled sponsored by Inglis House. Supportive services are provided.
Jackson St	2	2	Leased/Issued	No	Existing site for low-income families in the West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Jannie's Place	17	17	Leased/Issued	No	New construction development for homeless individuals and families in the Mantua neighborhood of West Philadelphia sponsored by People's Emergency Center. Supportive services are provided.
JBH Homes	15	15	Leased/Issued	No	Existing site for homeless with special needs in the Fairmount area sponsored by Project Home. Supportive services are provided.
Kate's Place	35	35	Leased/Issued	No	Existing site for singles and people with disabilities in the Center City area sponsored by Peoples Emergency Center. Supportive services are provided.
Kendrick/Gillespie St	11	11	Leased/Issued	No	Existing site for low-income families in Holmesburg sponsored by Mission First Housing Group. Supportive services are provided.
Keystone St	6	6	Leased/Issued	No	Existing site for families in Northeast Philadelphia sponsored by Mission First

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					Housing Group. Supportive services are provided.
Kings Highway Phase II	31	31	Committed	No	Existing project in the Kensington area at 2004-06 Stella St, 2927-73 Frankford Ave and 3024-26 Frankford Ave for low-income families sponsored by Mission First.
Larchwood St	4	4	Leased/Issued	No	Existing site for low-income families in Spruce Hill section of Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Lehigh Park I	49	49	Leased/Issued	Yes	Rehabilitation of existing housing serving low-income families, sponsored by HACE. Supportive services are provided.
Lehigh Park II	25	25	Leased/Issued	No	Existing site for families, elderly or disabled sponsored by HACE. Supportive services are provided.
Liberty at Disston	5	5	Leased/Issued	No	Rehabilitation of nursing home in Northeast Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Liberty Resource	2	2	Leased/Issued	No	Rehabilitation of development with a preference for disabled seniors in West Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Liberty Welsh	0	2	Leased/Issued	No	Rehabilitation of nursing home in Northeast Philadelphia sponsored by Liberty Resources. Supportive services are provided.
Lindley Court	11	11	Leased/Issued	No	Rehabilitation site in Logan for seniors sponsored by Presby Inspired Life. Supportive services are provided.
Los Balcones	21	21	Leased/Issued	No	Existing site for low-income women and families in North Philadelphia sponsored by Norris Square Association.
Martin St	7	7	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Monument Mews	60	60	Leased/Issued	No	New construction development for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Monument Village	11	11	Leased/Issued	No	Existing site for single women in West Philadelphia sponsored by Methodist Homes. Supportive services are provided.
Morton St	2	2	Leased/Issued	No	Existing site for low-income families in Germantown Philadelphia sponsored by

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					Mission First Housing Group. Supportive services are provided.
MPB School Apartments	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Mission First Housing Group.
Mt Vernon II	15	15	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mt Vernon LP.
Mt. Vernon I	15	15	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mt Vernon LP.
New Courtland at Allegheny	40	40	Leased/Issued	No	New construction development for low-income seniors in North Philadelphia sponsored by New Courtland. Supportive services are provided.
New Courtland at Burholme	35	35	Committed	No	Existing project in the Northeast area at 7023 Rising Sun Ave for low-income seniors sponsored by New Courtland.
New Courtland at Cliveden	32	32	Leased/Issued	No	New construction development for low-income seniors in Germantown sponsored by New Courtland. Supportive services are provided.
New Courtland at St Barts	42	42	Leased/Issued	Yes	New construction in Northeast Philadelphia for seniors, sponsored by New Courtland. Supportive services are provided.
Norris Apartments Phase V	45	45	Leased/Issued	Yes	Choice Neighborhood RAD conversion sponsored by PHA.
Norris CNI Phase II	74	74	Leased/Issued	Yes	New construction family public housing replacement units sponsored by PHA.
Norris LP	51	51	Leased/Issued	Yes	Conversion of existing PAPMC public housing development sponsored by PHA.
NPCH - Community Building	16	16	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by NPCH Associates.
Oakdale St	12	12	Leased/Issued	No	New construction site for low-income families sponsored by Philadelphia Housing Authority.
Osage Ave	0	0	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Parkside 10	41	41	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Parkside 11	8	8	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Paseo Verde	19	19	Leased/Issued	No	New construction development for very low-income families in North Philadelphia sponsored by Transit Village Affordable Housing LP.
Patriot House	15	15	Leased/Issued	No	Existing site for homeless individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Penrose	10	10	Leased/Issued	No	Existing site for homeless individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Plymouth Hall	53	53	Leased/Issued	Yes	Existing site for seniors in North Philadelphia, sponsored by PHA.
Powelton Heights	30	30	Leased/Issued	No	Existing site for seniors in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Preston St	7	7	Leased/Issued	No	Existing site for low-income families in the West Philadelphia area sponsored by Mission First Housing Group. Supportive services are provided.
Queen Lane	55	55	Leased/Issued	Yes	Conversion of existing PAPMC development sponsored by PHA.
Ray's Place	17	17	Leased/Issued	No	New construction development for homeless persons with a serious mental illness in North Philadelphia sponsored by Project Home. Supportive services are provided.
Reed St	8	8	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Regent Terrace	80	80	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Regent Terrace Housing Partnership.
Reynolds School	49	49	Leased/Issued	Yes	Adaptive reuse to convert elementary school into housing for homeless veterans sponsored by HELP USA. Supportive services are provided.
Rhawn and Academy	51	51	Committed	No	Existing project in the Northeast area at 714-718 Rhawn St and 11901-13 Academy Rd for disabled homeless or at risk of homelessness sponsored by Mission First.
Rhawn St	11	11	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Roberto Clemente House	38	38	Leased/Issued	Yes	Substantial rehabilitation development in North Philadelphia serving low-income families, sponsored by Nueva

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
					Esperanza. Supportive services are provided.
Sandy's/Catherine House	3	3	Leased/Issued	No	Existing site for homeless individuals in South Philadelphia sponsored by CATCH. Supportive services are provided.
Sarah Allen Community Homes	1	1	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Haverford Square Properties; Supportive services are provided.
Sarah Allen IV	2	2	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Haverford Square Properties Supportive services are provided.
Sarah Allen V	3	3	Leased/Issued	No	Existing site for low-income families in West Philadelphia sponsored by Haverford Square Properties. Supportive services are provided.
Sartain School	35	35	Leased/Issued	No	Existing site for seniors in North Philadelphia sponsored by Sartain School Venture.
School of Nursing – Project HOME	50	50	Committed	No	Rehabilitation of former nursing school building for homeless individuals sponsored by Project HOME. Supportive services to be provided
Sharswood Hunt Phase 1	30	30	Committed	Yes	New construction, mixed income development with 60 total units developed by Hunt-Pennrose as part of Sharswood CNI Plan
Sheff/Wingate St	8	8	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Sheila D Brown Women's Center	9	9	Leased/Issued	No	Existing site for women with behavioral disabilities in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
SIL Program	13	13	Leased/Issued	No	Existing site for individuals with mental health/chemical dependency in Roxborough. Supportive services provided. Sponsored by Inter Community Action
South 55th St LP	18	18	Leased/Issued	No	Existing site for diverse tenants in West Philadelphia sponsored by Ingerman.
South Phila Scattered	11	11	Leased/Issued	No	Existing site for low-income families in Northeast Philadelphia sponsored by Mission First Housing Group.
Spring Garden	9	9	Leased/Issued	No	Existing site for homeless families with disability in West Philadelphia sponsored by Peoples Emergency Center. Supportive services are provided.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Spruce St	3	3	Leased/Issued	No	Existing site for low-income families in South Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
St John Neumann	52	52	Leased/Issued	Yes	New construction in South Philadelphia serving seniors, sponsored by Archdiocese of Philadelphia. Supportive services are provided.
St. John Neumann Place	52	52	Committed	No	Existing project in the Greys Ferry area at 2600 Moore St for low-income elderly families sponsored by Catholic Housing and Community Services.
Strawberry Mansion	55	55	Leased/Issued	Yes	New construction in North Philadelphia for low-income families, sponsored by PHA.
Susquehanna Apt	47	47	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Susquehanna Apts LP.
Susquehanna Square	37	37	Committed	Yes	New construction development in North Philadelphia serving low income families sponsored by Community Ventures.
Thompson St	20	20	Leased/Issued	No	Existing site for very low-income families in Center City and West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
Tillmon Villanueva	38	38	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
Tioga Family Center	24	24	Leased/Issued	No	New construction development for homeless low-income individuals in North Philadelphia sponsored by Gaudenzia Foundation Inc. Supportive services are provided.
Tioga Gardens	17	17	Leased/Issued	No	Existing site for very low-income families in North Philadelphia sponsored by Tioga Gardens Associates.
Vernon House	68	68	Committed	No	Existing project in the Strawberry Mansion area at 3226 Clifford St for low-income elderly/disabled families sponsored by Pennrose Management.
Villas De Caribe	44	44	Committed	No	Existing project in the Fairhill area at 161-171 W Allegheny Ave for low-income families sponsored by HACE.
Villas De Hace	18	18	Committed	No	Existing project in the Ludlow area at 1426-44 N 6th St and 1429-31 N Marshall St for low-income families sponsored by HACE.

Property Name	# of Project-Based Vouchers		Status at End of Plan Year	RAD?	Description of Project
	Planned	Actual			
Walnut Park Plaza	224	224	Leased/Issued	No	Existing site for low-income seniors in West Philadelphia sponsored by Walnut Park Associates LLC.
Walnut Park Plaza (ADA)	3	3	Leased/Issued	No	Existing site for low-income seniors in West Philadelphia sponsored by Walnut Park Associates LLC.
Walnut St	15	15	Leased/Issued	No	Existing site for very low-income families in West Philadelphia sponsored by Mission First Housing Group. Supportive services are provided.
WCRP TNI 1	12	12	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
WCRP TNI 2	9	9	Leased/Issued	No	Existing site for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
WCRP-Grace	36	36	Leased/Issued	No	New construction development for women and their families in North Philadelphia sponsored by Women's Community Revitalization Project. Supportive services are provided.
Witherspoon Senior Apts	40	40	Leased/Issued	Yes	New construction in West Philadelphia serving seniors, sponsored by Presbys Inspired Life. Supportive services are provided.
	4,476	4,476	Total Existing Project-based Vouchers		

Describe differences between the Planned and Actual Existing Number of Vouchers Project-Based:

Though not anticipated for FY 2024, two (2) units at Liberty Welsh are now under HAP contract. Four (4) non-RAD units were added to the Harrison Senior Tower development. Additionally, six (6) units at Blumberg Phase I were erroneously listed twice in the FY 2024 MTW Plan.

iii. Actual Other Changes to MTW Housing Stock During the Plan Year

PHA, in collaboration with the City of Philadelphia and a network of community partners, continued to pursue opportunities and take action to help further the mutual goal of development of new affordable housing. Table 4 below provides an update on changes to PHA's housing stock during FY 2024 not discussed elsewhere in the Report and an update on planned initiatives that were identified in the FY 2024 Annual Plan.

Table 4: Actual Other Changes to MTW Housing Stock in the Plan Year

Site	Description of Project from FY 2024 Plan	Status as of March 31, 2024
Brooklyn Heights	PHA will continue to pursue the acquisition (PRA) of land in the Mill Creek neighborhood and is working to address complex title issues in order to develop approximately 32 units on the property.	PHA continued to pursue the acquisition (PRA) of land in the Mill Creek neighborhood and development of units on the property. During FY 2024, PHA worked to address complex title issues impacting plans to develop these units.
Strawberry Mansion Acquisition/ Redevelopment	PHA will continue planning and preparing for several rental developments in the Strawberry Mansion section of the City which will include acquisition of publicly and privately owned parcels in the neighborhood. PHA is currently working with a development partner on a rental phase which will include approximately 70 rental units near the newly developed Gordon Apartments.	PHA continued preparations for several rental developments in the Strawberry Mansion section of the City which will include acquisition of publicly and privately owned parcels in the neighborhood. In FY 2024, PHA worked with a development partner on a rental phase which will include approximately 70 rental units near the newly developed Gordon Apartments.
Falls Ridge	PHA listed vacant land at the former Schuylkill Falls public housing development for sale at fair market value and accepted an offer proposing construction of approximately 150 market rate units on the vacant land. However, the selected developer was unable to finalize zoning approvals, therefore, PHA terminated this agreement. PHA intends to relist the property for fair market value.	The selected developer was unable to finalize zoning approvals and PHA terminated this agreement. In FY 2024, PHA re-listed the property for fair market value.
2012 Chestnut Street	PHA entered into a development agreement with a private developer (Alterra Property Group) to develop the vacant, former PHA headquarters site at 2012 Chestnut Street into up to 200 units of housing of which 20% will be targeted to households with incomes at or below 80% of Area Median Income. The development is also planned to include 7,000 square ft. of commercial space. Discussions on the respective roles of the developer and PHA, project financing and the final development configuration are ongoing. Based on the outcomes of these discussions, PHA will apply to demolish and/or dispose of the property.	In FY 2024, PHA obtained demolition approval from HUD for 2012 Chestnut Street. Discussions on the respective roles of the private developer and PHA, project financing and the final development configuration were ongoing in FY 2024.
Vaux Community Building	PHA has completed the majority of the renovations to the building, which serves as a community center and focal point for the Sharswood/Blumberg neighborhood revitalization effort. Renovations to the auditorium are planned for the future, subject to funding availability.	In FY 2024, PHA continued to expand resident programs and support available at the Vaux Community building. In addition to Resident Programs and Partnerships (RPP) Workforce Center, the building hosts a large number of partners including a new indoor farming and food entrepreneurship start-up and a trauma counseling agency. A new federally-qualified health center took over

Site	Description of Project from FY 2024 Plan	Status as of March 31, 2024
		operation of a health clinic in FY 2024 serving both PHA residents and the larger Sharswood community.
Vacant Lot Disposition	PHA owns over 700 vacant lot parcels. PHA plans to dispose of some of the properties for fair market value, to the Land Bank, to a PHA affiliate or alternate means. In partnership with various City Councilmembers and nonprofit affordable housing developers throughout the City, PHA plans to develop 240 vacant lots and shells into long-term affordable housing with a twenty-year restrictive covenant.	In partnership with various City Councilmembers and nonprofit affordable housing developers throughout the City, PHA continued planning and preparations to develop up to 240 vacant lots and shells into long-term affordable housing with a twenty-year restrictive covenant.
Various Sites - To be determined	PHA continues to actively pursue opportunities to expand affordable housing by utilizing HUD's Faircloth to RAD conversion program. Under this initiative, PHA may enter into partnerships and/or directly develop new public housing that will be converted to PBV assistance upon completion.	In FY 2024, PHA submitted RAD Significant amendments to convert 10 properties under Faircloth to RAD.
Walton School	PHA, either directly or with a third party developer partner, intends to rehabilitate this former school building into approximately 51 rental units for seniors.	PHA, in partnership with HELP USA, continued planning and preparations to rehabilitate this former school building into approximately 48 rental units for seniors.
Brewerytown Homeownership Initiative	PHA issued a Request for Proposals to develop affordable homeownership units on scattered sites that were part of a RAD conversion in the Brewerytown section of Philadelphia.	In FY 2024, PHA worked on the transfer of properties to be rehabilitated in the Brewerytown neighborhood. These properties will be sold to eligible low-income families, with the first opportunity to buy going to participants in PHA's Opening Doors to Homeownership program.
West Philadelphia Homeownership Initiative	PHA issued a Request for Proposals to develop affordable homeownership units on scattered sites that were part of a RAD conversion in the Western section of Philadelphia.	PHA partnered with Crowdcopia, DKJ Construction, Nicetown CDC and Townes Mechanical to renovate 25 scattered sites homes. Renovations are underway on 10 of these scattered sites units.
City Wide Homeownership Initiative	PHA intends to issue a Request for Proposals to develop affordable homeownership units on scattered sites that were part of a RAD conversion or within its existing portfolio in various sections of Philadelphia.	This project is on-going; PHA continued planning and preparations to issue Request for Proposals for affordable homeownership units in FY 2024.
2112 Ridge	PHA intends to build a mixed-use building that will include affordable housing for the underserved homeless and housing insecure LGBTQIA young adult population along with ground floor retail.	This project is on-going; PHA continued planning in FY 2024 for this mixed-use building.
Ridge Avenue Mixed Use	PHA intends to work with development partners to construct mixed-use buildings on vacant lots/buildings along the 2100 – 2300 blocks of Ridge Avenue.	This project was on-going in FY 2024.
AME Public Housing Sites	PHA will continue to work with project owner/sponsors of AME public housing sites to explore the feasibility of converting from public	This project is on-going; PHA continued to work with project owner/sponsors of AME public

Site	Description of Project from FY 2024 Plan	Status as of March 31, 2024
	housing to project-based assistance through the RAD program to ensure long-term preservation of affordable housing units.	housing sites in FY 2024 to explore the feasibility of conversion.
Spring Gardens Phase II	Spring Gardens II is an AME public housing site owned by a limited partnership with Michaels Development as the general partner. The development is nearing the end of its initial LIHTC compliance period. PHA is interested in acquiring ownership from Michaels Development. Following acquisition, PHA may convert the site to project-based assistance through the RAD program to ensure long-term preservation of affordable housing.	This project is on-going: PHA continued to explore the potential for conversion and/or disposition of the site.
Philadelphia Nursing Home	The Philadelphia Nursing Home is a 402-bed long-term care nursing facility located at 2100 West Girard Avenue in the Sharswood neighborhood. The facility is owned by the Commonwealth of Pennsylvania and is currently leased to the City of Philadelphia. The City has announced its intention to close the nursing home and terminate the lease by the end of 2022 and to safely relocate existing residents to other nursing facilities. PHA is exploring the option to procure the site from the State and to then comprehensively redevelop it.	In FY 2024, PHA proposed to acquire the site from the Commonwealth of Pennsylvania for a multi-use development that will include a hospice facility, assisted living units, and independent living apartments as well as newly constructed townhome-style multifamily units.

The RAD program allows PHA to leverage MTW funds, private and other capital sources through conversion of public housing subsidies to long-term project-based assistance. RAD is a fundamental component of PHA’s asset repositioning strategy and efforts to secure new capital resources necessary for the long-term preservation and expansion of PHA’s existing housing portfolio. RAD also allows PHA to transfer subsidies from long-term vacant and distressed scattered site properties to new developments (“transfer of assistance”). Table 5 provides a list of 34 RAD development transactions that have closed through FY 2024, including transactions that closed in prior periods. Including only those RAD projects that have already closed, total development costs exceed \$685 million including over \$303 million in private equity.

Table 5: RAD Conversions: Closed Transactions through FY 2024

Property Name	RAD Units	Description
Blumberg Phase I	51	Transfer of Assistance
2415 N. Broad	88	Transfer of Assistance
St John Neumann Place II	52	Transfer of Assistance
H.E.L.P Philadelphia V	37	Transfer of Assistance
New Courtland at St. Bartholomew	42	Transfer of Assistance
Lehigh Park I	49	Transfer of Assistance
Southwark Plaza (PA2-121)	470	Conversion of existing AME public housing
Strawberry Mansion	55	Transfer of Assistance
Haddington III	48	Transfer of Assistance

Property Name	RAD Units	Description
Roberto Clemente House	38	Transfer of Assistance
Norris Apartments II (CNI)	74	CNI RAD Conversion
Cantrell Place	40	Transfer of Assistance
Witherspoon Senior Apartments	40	Transfer of Assistance
1315 N. 8th Street	25	Transfer of Assistance
Blumberg Phase II-Senior Building	94	Conversion of existing public housing
Norris Square Community Alliance Scattered Sites	29	Transfer of Assistance
Plymouth Hall (PA2-079)	53	Conversion of existing public housing
Norris Apartments Phase III	28	CNI RAD Conversion
Blumberg 83	83	Transfer of Assistance
Susquehanna Square	37	Transfer of Assistance
Norris Apartments Phase V (CNI)	45	CNI RAD Conversion
Reynolds School	49	Transfer of Assistance
27th and Susquehanna	78	Transfer of Assistance
Sharswood I (Hunt)	30	Transfer of Assistance
Queen Lane LP	55	Conversion of existing PAPMC public housing
Norris LP	51	Conversion of existing PAPMC public housing
Harrison Plaza Tower	112	Conversion of tower building of existing public housing development
Sharswood II (Hunt)	30	Transfer of Assistance
Sharswood 4a	58	Transfer of Assistance
Janney Apartments	29	Transfer of Assistance
NewCourtland at St. Barts II	48	New construction development under Faircloth to RAD
Father Augustus Tolton Place (Eastwick Senior)	45	New construction development under Faircloth to RAD
Old First House	34	Transfer of Assistance
Sharswood Phase VI-A	65	Transfer of Assistance
TOTAL	2,162	

In addition to the units and developments listed in Table 5, PHA also made progress planning for RAD conversions anticipated for FY 2025, which will include an additional 2,999 units at 31 developments. See RAD Amendments #1 and #2 to the FY 2024 MTW Annual Plan for additional details on planned RAD conversion activities. Actual unit counts and conversion timetables may vary depending on various factors including financing and regulatory approvals.

i. General Description of All Actual Capital Expenditures During the Plan Year

The backlog of unmet and unfunded capital needs for PHA's public housing developments is currently estimated at \$1.5 billion and growing. However, due to obsolescence at some sites and other factors, PHA currently estimates the actual cost to preserve the existing portfolio (which will require complete redevelopment at multiple sites) is approximately \$4.2 billion. PHA can address

only a small fraction of its capital needs with existing funding. More than 75% of all PHA units were built over 40 years ago and over 55% were built 60 or more years ago. Several sites are functionally obsolete from design, efficiency and operating cost perspectives; however, the availability of funding to support major redevelopment efforts has been extremely limited, a situation that appears unlikely to change in the near future, given federal budget constraints. PHA continues to aggressively pursue conversions through RAD in part to leverage funds to ensure long-term preservation of the existing portfolio. Table 6 provides a general description of actual capital expenditures in FY 2024.

Table 6: Actual Capital Expenditures in FY 2024

Project Type	Site Name	Project Description	Actual
Capital Improvements	Johnson Homes	504 Site Modifications / Fair Hsg	\$47,632
Capital Improvements	Richard Allen	504 Site Modifications / Fair Hsg	\$12,968
Capital Improvements	Raymond Rosen	504 Site Modifications / Fair Hsg	\$40,557
Capital Improvements	Wilson Park - Senior	504 Site Modifications / Fair Hsg	\$59,985
Capital Improvements	Harrison Plaza	504 Site Modifications / Fair Hsg	\$17,151
Capital Improvements	Arch Homes	504 Site Modifications / Fair Hsg	\$1,427
Capital Improvements	Spring Garden Apts	504 Site Modifications / Fair Hsg	\$8,634
Capital Improvements	Hill Creek	504 Site Modifications / Fair Hsg	\$38,996
Capital Improvements	Abbottsford Homes	504 Site Modifications / Fair Hsg	\$20,685
Capital Improvements	Oxford Village	504 Site Modifications / Fair Hsg	\$22,999
Capital Improvements	Whitehall Apts	504 Site Modifications / Fair Hsg	\$19,050
Capital Improvements	Haddington Homes	504 Site Modifications / Fair Hsg	\$16,762
Capital Improvements	Champlost Homes	504 Site Modifications / Fair Hsg	\$26,220
Capital Improvements	Haverford Homes	504 Site Modifications / Fair Hsg	\$2,119
Capital Improvements	Morton Homes	504 Site Modifications / Fair Hsg	\$39,457
Capital Improvements	College View	504 Site Modifications / Fair Hsg	\$6,301
Capital Improvements	Cecil B Moore	504 Site Modifications / Fair Hsg	\$1,331
Capital Improvements	Arlene Homes	504 Site Modifications / Fair Hsg	\$4,853
Capital Improvements	Fairhill Apartments	504 Site Modifications / Fair Hsg	\$1,191
Capital Improvements	Haddington	504 Site Modifications / Fair Hsg	\$63,321
Capital Improvements	Mantua	504 Site Modifications / Fair Hsg	\$35,617
Capital Improvements	Kingsessing	504 Site Modifications / Fair Hsg	\$62,961
Capital Improvements	Germantown/Hunting Park	504 Site Modifications / Fair Hsg	\$28,957
Capital Improvements	Fairhill Square	504 Site Modifications / Fair Hsg	\$119,497
Capital Improvements	Francisville	504 Site Modifications / Fair Hsg	\$116,366
Capital Improvements	Ludlow	504 Site Modifications / Fair Hsg	\$82,480
Capital Improvements	Susquehanna	504 Site Modifications / Fair Hsg	\$27,007
Capital Improvements	Strawberry Mansion	504 Site Modifications / Fair Hsg	\$24,384
Capital Improvements	Oxford Jefferson	504 Site Modifications / Fair Hsg	\$29,605
Capital Improvements	Scattered Sites 901-910	Roofing	\$2,868,128
Capital Improvements	Scattered Sites 901-910	Sitework - Tree Removal	\$38,215
Capital Improvements	College View	Plumbing Upgrades	\$59,681
Capital Improvements	Spring Garden Apartments	Plumbing Upgrades	\$35,817
ECM	Abbottsford Homes	EPC PHASE V	\$341,094
ECM	Bentley Hall	EPC PHASE V	\$61,508
ECM	Cassie L Holley	EPC PHASE V	\$57,140
ECM	College View	EPC PHASE V	\$153,616
ECM	Emlen Arms	EPC PHASE V	\$61,742
ECM	Gladys B Jacob	EPC PHASE V	\$77,817
ECM	Haddington Homes	EPC PHASE V	\$124,105

Project Type	Site Name	Project Description	Actual
ECM	Haverford Homes	EPC PHASE V	\$202,840
ECM	Hill Creek	EPC PHASE V	\$1,216,193
ECM	Holmecrest Homes	EPC PHASE V	\$757,561
ECM	Katie B Jackson	EPC PHASE V	\$86,516
ECM	Raymond Rosen	EPC PHASE V	\$2,706,682
ECM	Spring Garden Apartments	EPC PHASE V	\$202,776
ECM	Wilson Park	EPC PHASE V	\$6,993,093
Modernization	Scattered Sites Substantial Rehab	901-910	\$9,888,557
New Development	Sharswood / Blumberg	Sharswood 6A LP	\$3,302,952
New Development	Sharswood / Blumberg	Sharswood Phase 4A LP	\$2,766,655
New Development	20th & Cecil B. Moore	20th & Cecil B. Moore	\$1,859
New Development	28th & York	28th & York	\$87,630
New Development	Beyond Foster Care On Ridge	Beyond Foster Care On Ridge	\$800,324
New Development	Harlan Street	Harlan Street	\$2,690,266
New Development	Harrison Plaza Phase I	Harrison Plaza Phase I	\$361
New Development	Harrison Senior Tower LP	Harrison Senior Tower LP	\$9,785,973
New Development	Hunt Development Sharswood	Hunt Development Sharswood	\$10,962
New Development	Hunt Sharswood Phase III	Hunt Sharswood Phase III	\$19,108,739
New Development	Fairhill Apts	Phase III (off site)	\$3,433,263
New Development	West Park Apts	Westpark Apts. PHASE 2	\$1,348,049
New Development	Fairhill Apts	Phase II (South Side)	\$971,676
New Development	Fairhill Apts	Phase I (North Side)	\$1,088,930
New Development	Hartranft Community Center	Hartranft Community Center	\$2,500,107
New Development	PHA Logistics Center	PHA Warehouse	\$3,318,446
New Development	Fairhill Apts	Phase II (South Side)-Demolition	\$1,961,043
New Development	Fairhill Apts	Phase I (North Side) - Demolition	\$26,387
Capital Improvements	Abbottsford Homes	504 Unit Modifications/Fair Hsg	\$42,170
Capital Improvements	Arch Homes	504 Unit Modifications/Fair Hsg	\$1,457
Capital Improvements	Bartram Village	504 Unit Modifications/Fair Hsg	\$5,658
Capital Improvements	Bentley Hall	504 Unit Modifications/Fair Hsg	\$335
Capital Improvements	Cassie L Holley	504 Unit Modifications/Fair Hsg	\$3,878
Capital Improvements	Champlost Homes	504 Unit Modifications/Fair Hsg	\$16,986
Capital Improvements	College View	504 Unit Modifications/Fair Hsg	\$923
Capital Improvements	Emlen Arms	504 Unit Modifications/Fair Hsg	\$663
Capital Improvements	Gladys B Jacobs	504 Unit Modifications/Fair Hsg	\$16,876
Capital Improvements	Haddington Homes	504 Unit Modifications/Fair Hsg	\$13,264
Capital Improvements	Harrison Plaza	504 Unit Modifications/Fair Hsg	\$1,475
Capital Improvements	Haverford Homes	504 Unit Modifications/Fair Hsg	\$230
Capital Improvements	Hill Creek	504 Unit Modifications/Fair Hsg	\$12,984
Capital Improvements	Holmecrest Homes	504 Unit Modifications/Fair Hsg	\$9,106
Capital Improvements	Johnson Homes	504 Unit Modifications/Fair Hsg	\$23,008
Capital Improvements	Katie B Jackson	504 Unit Modifications/Fair Hsg	\$917
Capital Improvements	Morton Homes	504 Unit Modifications/Fair Hsg	\$7,912
Capital Improvements	Oxford Village	504 Unit Modifications/Fair Hsg	\$31,078
Capital Improvements	Parkview Apartments	504 Unit Modifications/Fair Hsg	\$282
Capital Improvements	Queen's Row Low Income	504 Unit Modifications/Fair Hsg	\$759
Capital Improvements	Raymond Rosen	504 Unit Modifications/Fair Hsg	\$32,368
Capital Improvements	Richard Allen	504 Unit Modifications/Fair Hsg	\$11,473
Capital Improvements	Scattered Sites-Fairhill Square	504 Unit Modifications/Fair Hsg	\$20,976
Capital Improvements	Scattered Sites-Francisville	504 Unit Modifications/Fair Hsg	\$22,967
Capital Improvements	Scattered Sites-Germantown/Hunting Park	504 Unit Modifications/Fair Hsg	\$9,927
Capital Improvements	Scattered Sites-Haddington	504 Unit Modifications/Fair Hsg	\$15,886

Project Type	Site Name	Project Description	Actual
Capital Improvements	Scattered Sites-Kingsessing	504 Unit Modifications/Fair Hsg	\$34,907
Capital Improvements	Scattered Sites-Ludlow	504 Unit Modifications/Fair Hsg	\$36,202
Capital Improvements	Scattered Sites-Mantua	504 Unit Modifications/Fair Hsg	\$13,039
Capital Improvements	Scattered Sites-Oxford Jefferson	504 Unit Modifications/Fair Hsg	\$6,360
Capital Improvements	Scattered Sites-Strawberry Mansion	504 Unit Modifications/Fair Hsg	\$21,361
Capital Improvements	Scattered Sites-Susquehanna	504 Unit Modifications/Fair Hsg	\$9,813
Capital Improvements	Spring Garden Apartments	504 Unit Modifications/Fair Hsg	\$627
Capital Improvements	Westpark Plaza	504 Unit Modifications/Fair Hsg	\$2,389
Capital Improvements	Whitehall Apartments	504 Unit Modifications/Fair Hsg	\$21,185
Capital Improvements	Wilson Park - Senior	504 Unit Modifications/Fair Hsg	\$47,087
Capital Improvements	Cecil B Moore	A&E Fees & Professional Serv	\$5,171
Capital Improvements	CNI Bartram Village	A&E Fees & Professional Serv	\$36,840
Capital Improvements	Fairhill Apartments	A&E Fees & Professional Serv	\$13,127
Capital Improvements	Harrison Plaza	A&E Fees & Professional Serv	\$18,431
Capital Improvements	Haverford Homes	A&E Fees & Professional Serv	\$2,474
Capital Improvements	Holmecrest Homes	A&E Fees & Professional Serv	\$4,500
Capital Improvements	Johnson Homes	A&E Fees & Professional Serv	\$54,555
Capital Improvements	Oxford Village	A&E Fees & Professional Serv	\$4,500
Capital Improvements	Parkview Apartments	A&E Fees & Professional Serv	\$2,474
Capital Improvements	PHA-Wide	A&E Fees & Professional Serv	\$11,030
Capital Improvements	Ridge Avenue - North Lot	A&E Fees & Professional Serv	\$1,204
Capital Improvements	Scattered Sites-Strawberry Mansion	A&E Fees & Professional Serv	\$24,090
Capital Improvements	Wilson Park - Senior	A&E Fees & Professional Serv	\$2,474
Capital Improvements	Harrison Plaza	Concrete and pavement	\$11,240
Capital Improvements	Holmecrest Homes	Concrete and pavement	\$3,120
Capital Improvements	Raymond Rosen	Concrete and pavement	\$2,000
Capital Improvements	Richard Allen	Concrete and pavement	\$50,100
Capital Improvements	Scattered Sites-Fairhill Square	Concrete and pavement	\$7,250
Capital Improvements	Scattered Sites-Francisville	Concrete and pavement	\$9,104
Capital Improvements	Scattered Sites-Ludlow	Concrete and pavement	\$10,510
Capital Improvements	Scattered Sites-Oxford Jefferson	Concrete and pavement	\$1,820
Capital Improvements	Scattered Sites-Strawberry Mansion	Concrete and pavement	\$3,206
Capital Improvements	Scattered Sites-Susquehanna	Concrete and pavement	\$1,500
Capital Improvements	Spring Garden Apartments	Concrete and pavement	\$7,750
Capital Improvements	Whitehall Apartments	Concrete and pavement	\$11,825
Capital Improvements	Richard Allen	Demolition	\$156,700
Capital Improvements	Cassie L Holley	Doors / Storm Doors	\$15,824
Capital Improvements	Champlost Homes	Doors / Storm Doors	\$448,629
Capital Improvements	College View	Doors / Storm Doors	\$82,500
Capital Improvements	Whitehall Apartments	Doors / Storm Doors	\$1,165,476
Capital Improvements	Wilson Park - Senior	Doors / Storm Doors	\$131,000
Capital Improvements	Haddington Homes	Electrical distribution system	\$985,000
Capital Improvements	Hill Creek	Electrical distribution system	\$1,400
Capital Improvements	Richard Allen	Electrical distribution system	\$257,185
Capital Improvements	Abbottsford Homes	Environmental hazard abate /LBP	\$39,864
Capital Improvements	Arch Homes	Environmental hazard abate /LBP	\$37,171
Capital Improvements	Bartram Village	Environmental hazard abate /LBP	\$25,154
Capital Improvements	Bentley Hall	Environmental hazard abate /LBP	\$565
Capital Improvements	Champlost Homes	Environmental hazard abate /LBP	\$49,938
Capital Improvements	College View	Environmental hazard abate /LBP	\$48,725

Project Type	Site Name	Project Description	Actual
Capital Improvements	Emlen Arms	Environmental hazard abate /LBP	\$1,088
Capital Improvements	Haddington Homes	Environmental hazard abate /LBP	\$15,330
Capital Improvements	Haverford Homes	Environmental hazard abate /LBP	\$11,532
Capital Improvements	Hill Creek	Environmental hazard abate /LBP	\$85,536
Capital Improvements	Johnson Homes	Environmental hazard abate /LBP	\$44,483
Capital Improvements	Morton Homes	Environmental hazard abate /LBP	\$28,460
Capital Improvements	Oxford Village	Environmental hazard abate /LBP	\$82,073
Capital Improvements	Raymond Rosen	Environmental hazard abate /LBP	\$19,503
Capital Improvements	Scattered Sites-Fairhill Square	Environmental hazard abate /LBP	\$49,176
Capital Improvements	Scattered Sites-Francisville	Environmental hazard abate /LBP	\$40,642
Capital Improvements	Scattered Sites-Germantown/Hunting Park	Environmental hazard abate /LBP	\$27,364
Capital Improvements	Scattered Sites-Haddington	Environmental hazard abate /LBP	\$66,740
Capital Improvements	Scattered Sites-Kingsessing	Environmental hazard abate /LBP	\$48,478
Capital Improvements	Scattered Sites-Ludlow	Environmental hazard abate /LBP	\$26,394
Capital Improvements	Scattered Sites-Mantua	Environmental hazard abate /LBP	\$38,430
Capital Improvements	Scattered Sites-Oxford Jefferson	Environmental hazard abate /LBP	\$21,645
Capital Improvements	Scattered Sites-Strawberry Mansion	Environmental hazard abate /LBP	\$23,151
Capital Improvements	Scattered Sites-Susquehanna	Environmental hazard abate /LBP	\$35,304
Capital Improvements	Spring Garden Apartments	Environmental hazard abate /LBP	\$64,471
Capital Improvements	Wilson Park - Senior	Environmental hazard abate /LBP	\$66,216
Capital Improvements	Gladys B Jacobs	Exterior bldg structures	\$123,604
Capital Improvements	Harrison Plaza	Exterior bldg structures	\$11,918
Capital Improvements	Raymond Rosen	Exterior bldg structures	\$1,160,984
Capital Improvements	Scattered Sites-Fairhill Square	Exterior bldg structures	\$6,000
Capital Improvements	Scattered Sites-Francisville	Exterior bldg structures	\$101,551
Capital Improvements	Scattered Sites-Germantown/Hunting Park	Exterior bldg structures	\$8,290
Capital Improvements	Scattered Sites-Ludlow	Exterior bldg structures	\$5,800
Capital Improvements	Scattered Sites-Mantua	Exterior bldg structures	\$18,525
Capital Improvements	Scattered Sites-Susquehanna	Exterior bldg structures	\$4,307
Capital Improvements	Arch Homes	Fire safety	\$106,439
Capital Improvements	Morton Homes	Fire safety	\$143,427
Capital Improvements	Wilson Park - Senior	Fire safety	\$178,736
Capital Improvements	Oxford Village	Flooring	\$497,731
Capital Improvements	Bartram Village	Heating Plant Upgrades	\$1,160
Capital Improvements	Sharswood / Blumberg	Infrastructure	\$5,815
Capital Improvements	Emlen Arms	Infrastructure	\$53,790
Capital Improvements	Gladys B Jacobs	Infrastructure	\$61,472
Capital Improvements	Wilson Park - Senior	Infrastructure	\$75,451
Capital Improvements	Germantown House	Property acquisition	\$333,292
Capital Improvements	Martin Luther King IV	Property acquisition	\$422,247
Capital Improvements	PHA Consolidated Headquarters	Public Infrastructure	\$52,352
Capital Improvements	Abbottsford Homes	Roof repair/replacement	\$1,672,367
Capital Improvements	Arch Homes	Roof repair/replacement	\$1,009,412
Capital Improvements	Champlost Homes	Roof repair/replacement	\$581,955
Capital Improvements	Emlen Arms	Roof repair/replacement	\$674,553
Capital Improvements	Haddington Homes	Roof repair/replacement	\$1,774,600
Capital Improvements	Hill Creek	Roof repair/replacement	\$56,754
Capital Improvements	Morton Homes	Roof repair/replacement	\$1,469,111
Capital Improvements	Oxford Village	Roof repair/replacement	\$93,156
Capital Improvements	Spring Garden Apartments	Roof repair/replacement	\$69,487

Project Type	Site Name	Project Description	Actual
Capital Improvements	Whitehall Apartments	Roof repair/replacement	\$55,776
Capital Improvements	College View	Window Replacement	\$390,738
Capital Improvements	Whitehall Apartments	Window Replacement	\$4,626,118
Capital Improvements	West Park Apartments	Security Systems	\$59,801
Capital Improvements	Wilson Park - Senior	Site Improvements	\$158,371
Capitalized Equipment	PHA-Wide	Computer Hardware / Software	\$180,318
Capitalized Equipment	PHA-Wide	Maintenance Equipment	\$58,071
Capitalized Equipment	PHA-Wide	Trash Truck / Freightliner	\$290,728
TOTAL			\$101,747,387

B. Leasing Information

i. Actual Number of Households Served

PHA provided housing assistance to approximately 32,565 households in FY 2024 through Public Housing (n=11,378), HCV (n=21,147) - including both MTW and Non-MTW Special Purpose vouchers - and local, non-traditional MTW programs (n=40). Excluding non-MTW vouchers, the total number of MTW-only households served was 30,324 as shown on the HUD required Table 7 below. The MTW HCV Utilized figure includes RAD vouchers/units. Non-MTW vouchers are shown in Table 8.

Table 7: MTW Households Served Planned vs. Actual

Planned Number of Households Served Through:	Number of Unit Months Occupied/Leased		Number of Households Served	
	Planned	Actual	Planned	Actual
MTW Public Housing Units Leased	137,880	136,533	11,490	11,378
MTW Housing Choice Vouchers (HCV) Utilized	226,752	226,876	18,896	18,906
Local, Non-Traditional: Tenant-Based	0	0	0	0
Local, Non-Traditional: Property-Based	492	482	41	40
Local, Non-Traditional: Homeownership	0	0	0	0
Planned/Actual Totals	365,124	363,891	30,427	30,324

Describe any differences between the planned and actual households served:

PHA noted in the Annual Plan that the actual number of households served may vary based on RAD conversion schedules and other factors. In addition to variances in RAD conversion schedules, other factors that resulted in differences in the number of households served included changes to lease up schedules for new project-based developments, move out rates and unit turnover timetables. See also “Discussion of Any Actual Issues/Solutions Related to Leasing” narrative below.

Note that all Family Unification Program (FUP) vouchers are now reported in Table 7, as both allocations of FUP voucher are part of the MTW voucher portfolio.

Table 8: Non-MTW Households Served Planned vs. Actual

Non-MTW Program to be Served Through:	Planned Number of Unit Months Occupied/Leased		Planned Number of Households Served	
	Planned	Actual	Planned	Actual
Mainstream	5,340	5,715	445	431
FUP (see note above)	900	0	75	0
VASH	9,960	8,444	830	704
VASH Project Based	168	69	14	6
Moderate Rehab	1,164	1,275	97	106
SRO	3,552	2,880	296	240
EHV	10,356	8,023	863	669
Foster Youth to Independence	900	1,022	75	85
Planned/Actual Totals	32,340	27,428	2,695	2,241

Table 9: MTW Local, Non-Traditional Programs

Local, Non-Traditional Category	MTW Activity/Number	Number of Unit Months Occupied/Leased		Number of Households Served	
		Planned	Actual	Planned	Actual
Tenant-Based	N/A	0	0	0	0
Property-Based	Shared Housing/MTW 2020-2*	492	482	41	40
Homeownership	N/A	0	0	0	0
Planned/Actual Totals		492	482	41	40

Table 10: Local, Non-Traditional Service Programs

Households Receiving Local, Non-Traditional Services Only	Average Number of Households Per Month	Total Number of Households in the Plan Year
0	0	0

In addition to its public housing and HCV rental assistance programs, PHA utilizes MTW funds to support public housing and HCV residents who wish to become first-time homebuyers. PHA's Homeownership Department works with a network of local partners to provide counseling, financial literacy, down payment assistance and other support services. In FY 2024, a total of 49 residents became first-time homebuyers through PHA's various homeownership programs, including 14 public housing residents who purchased scattered site units through the 5h program, 17 HCV participants who utilized vouchers to purchase private market unit, and 18 other PHA families who purchased units through the Public Housing Mobility program.

ii. Discussion of Any Actual Issues/Solutions Related to Leasing

Table 11: Issues/Solutions Related to Leasing

Housing Program	Description of Actual Leasing Issues and Possible Solutions
MTW Housing Choice Voucher	<p>PHA opened the HCV waiting list for a two-week period in early 2023. In FY 2024, PHA pulled over 2,000 applicants from the new HCV waiting list and issued vouchers throughout the year. To ensure fair and equitable access to the HCV program, PHA implemented tailored outreach efforts to applicants with limited English proficiency (LEP).</p> <p>To increase housing options for voucher-holders, PHA continued to implement a series of incentives designed to recruit new landlords to participate and encourage existing ones to expand their HCV portfolio. An increase in Small Area Fair Market Rents (FMRs) and improvements to the owner portal helped to boost landlord participation in the HCV program. Additional financial incentives included signing bonuses up to \$300 for any property owner or landlord that rents to a PHA voucher holder and submits the required PHA paperwork. However, PHA discontinued this incentive in late 2023.</p> <p>Throughout FY 2024, PHA provided a \$1,000 bonus to landlords who participate in HCV's Housing Opportunity Program and successfully rent a unit to an HCV participant in a qualified opportunity area. Additionally, PHA continued to provide damage and vacancy loss payments to mitigate the cost of expenses not covered by the security deposit.</p>

C. Waiting List Information

i. Actual Waiting List Information

In FY 2024, PHA continued to maintain waiting lists in accordance with its Board of Commissioners-approved HCV Administrative Plan and Public Housing Admissions and Continued Occupancy Policy, as applicable. PHA's conventional and scattered sites, PAPMC-managed, and Alternatively Managed Entities (AME) public housing sites remained subject to site-specific waitlist policies. PHA also operates a centralized "first available" waitlist for referral programs and for applicants who elect this option. As public housing sites convert to Project-Based Voucher (PBV) assistance through the RAD program, PHA converts the existing public housing site-based waiting lists, where applicable, to PBV site-based waiting lists. Conventional and scattered site public housing waiting lists remained open for seniors, those needing accessible units, and special programs including the nursing home initiative, Blueprint to End Homelessness, and DHS Youth Aging Out Pilot Program. PAPMC and AME waiting lists remained open in FY 2024.

In FY 2024, PHA updated the waiting lists for conventional and scattered sites Public Housing developments, gathering updated information from applicants and assigning a preference to families that include an adult who is working or engaged in job training or an education program. As described in *Activity 2021-1*, the waiting list preference applies only to applicants housed in scattered sites units, where families will be subject to the continued occupancy requirement for all adult family members to work or be engaged in job training or an education program (unless exempt). Please note that the update did not include waiting lists for Public Housing units that also have Low Income Tax Credits that are managed by PAPMC.

The HCV waiting list was closed in FY 2024 except for applicants who qualify for admission under HUD’s Special Purpose Voucher programs, including VASH, FYI, and Mainstream, as well as applicants referred to PHA from external agencies with whom PHA has a referral agreement as described in the Administrative Plan. Developments under PHA’s Unit Based Voucher program, including RAD developments, continued to establish and operate site-based waiting lists in accordance with PHA’s HCV Administrative Plan and/or with each owner’s regulatory and operating agreement with PHA or approved tenant selection plan. PHA’s waiting list data does not include UBV site-based waiting list data, except for PAPMC-managed UBV developments that are owned by PHA affiliates.

Table 12 provides information on HCV, conventional and scattered site public housing and PAPMC-managed waiting list as of March 31, 2024.

Table 12: Waiting List Information at Fiscal Year End

Waiting List Name	Description	Number of Households on Waiting List	Waiting List Open, Partially Open or Closed	Was the Waiting List Opened During the Fiscal Year
HCV Tenant Based	Community-Wide	8,262	Closed	No
HCV Project Based (PAPMC managed only)	Site-Based	35,177	Open	No*
Public Housing 1 – Conventional & Scattered Sites	First Available and Site-Based	5,400	Partially Open	No*
Public Housing 2 – PAPMC Tax Credit**	Site-Based	55,205	Open	No*

*PHA did not open these waiting lists during the fiscal year; they were continuously open throughout the fiscal year.

**Units funded with LIHTC and managed by PAPMC

Describe any duplication of applicants across waiting lists:

Waiting lists are maintained separately by program, and there may be duplication across the various waiting lists. For example, households on the HCV waiting list may also be on the Public Housing and/or PAPMC lists.

For informational purposes, details on the racial and ethnic composition of PHA’s waiting list applicants are provided in Tables 13 and 14 below. PHA has also provided data on its Limited English Proficiency Policy as an appendix to this document.

Table 13: Waiting List Applicants by Race

Waiting List	White	Black	American Indian	Asian	Hawaiian/Pacific Islander	Other	Total
MTW Public Housing Units	724	4522	73	58	23	0	5,400
MTW Public Housing Units*	6,978	46,502	730	547	391	57	55,205
MTW Housing Choice Voucher Program	1,211	6,693	158	120	68	12	8,262

Waiting List	White	Black	American Indian	Asian	Hawaiian/ Pacific Islander	Other	Total
PBV/PHA Owned	4,936	29,048	515	343	305	30	35,177
Total	13,849	86,765	1,476	1,068	787	99	104,044

*Units funded with LIHTC and managed by PAPMC

Table 14: Waiting List Applicants by Ethnicity

Waiting List	Hispanic	Non Hispanic	Other	Total
MTW Public Housing Units	492	4,903	5	5,400
MTW Public Housing Units *	6,850	48,301	54	55,205
MTW Housing Choice Voucher Program	1,015	7,150	97	8,262
PBV/PHA Owned	4,980	30,166	31	35,177
Total	13,337	90,520	187	104,044

* Units funded with LIHTC and managed by PAPMC

ii. Actual Changes to Waiting Lists in the Plan Year

PHA implemented its waiting list policies in accordance with Board approved policy documents.

D. Statutory Objectives and Requirements

Under the MTW Agreement between PHA and HUD, PHA is required to meet certain statutory objectives and other requirements, and to report on them in the MTW Annual Report. The tables below provide the required information.

i. 75% of Families Assisted Are Very Low Income

PHA serves many of Philadelphia's lowest-income families and individuals. More than 90% of households served are very low income, i.e. households with incomes at or below 50% of Area Median Income (AMI) with the vast majority having incomes that are less than 30% of AMI. The number of households admitted to the new Shared Housing Pilot Program, a local, non-traditional MTW activity, during the fiscal year is included in Table 15 below.

Table 15: Local Non-Traditional Households and Income Levels

Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
80% - 50% Area Median Income	1
49% - 30% Area Median Income	1
Below 30% Area Median Income	2
Total Local, Non-Traditional Households Admitted	4

Note that the actual number of households served as shown on Table 15 may differ from that shown on Table 9 due to HUD's requirement for calculating Table 9.

ii. Maintain Comparable Mix

As first noted in the FY 2014 Annual Report, beginning in May 2013, HUD has required MTW agencies to provide data on the number of persons in each household served as of the date of entry to the MTW program and as of the current fiscal year. While PHA has this data available for the current fiscal year, it does not have data and is unable to report on household size as of April 2001, which is the effective date of the MTW Agreement.

Note that PHA provided *bedroom size* data as part of its initial MTW submissions; however, PHA was not required to provide *household size* data. PHA's current information technology systems do not have 2001 data available. Therefore, PHA is not able to provide the information required in Tables 16 and 17 below relative to the size of families served in the MTW baseline year. PHA will work with HUD's MTW Office to identify potential solutions to this issue if necessary. For informational purposes, Table 18 provides a breakdown of PHA households by bedroom size when PHA became an MTW agency.

Table 16: Baseline Mix of Family Sizes Served

BASELINE MIX OF FAMILIES SERVED UPON ENTRY TO MTW					
Family Size	Occupied Number of Public Housing units	Utilized HCVs	Non-MTW Adjustments	Baseline Mix Number	Baseline Mix Percentage
1 Person	N/A	N/A	N/A	N/A	N/A
2 Person	N/A	N/A	N/A	N/A	N/A
3 Person	N/A	N/A	N/A	N/A	N/A
4 Person	N/A	N/A	N/A	N/A	N/A
5 Person	N/A	N/A	N/A	N/A	N/A
6+ Person	N/A	N/A	N/A	N/A	N/A
TOTAL	N/A	N/A	N/A	N/A	N/A

Please describe the justification for any “Non-MTW Adjustments” given above:

N/A

Table 17: Mix of MTW Family Sizes Served in FY 2024

Family Size	Baseline Mix Percentage	Number of MTW Households Served in Plan Year	Percentage of MTW Households Served in Plan Year	Percentage Change from Baseline Year to Current Plan Year
1 Person	N/A	15,030	45.15%	N/A
2 Person	N/A	6,551	19.68%	N/A
3 Person	N/A	5,085	15.28%	N/A
4 Person	N/A	3,429	10.30%	N/A
5 Person	N/A	1,778	5.34%	N/A
6+ Person	N/A	1,416	4.25%	N/A
TOTAL	N/A	33,289	100%	N/A

Note that the actual number of households served as shown on Table 17 may differ from that shown on Table 7 due to HUD's requirement for calculating Table 7.

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

N/A

Table 18: Mix of MTW Households by Bedroom Size in April 2001

	Bedroom Sizes of PHA Households in April 2001		
	Public Housing	HCV	Total
1 Bedroom/SRO	2,113	2,722	4,835
2 Bedroom	3,157	3,369	6,526
3 Bedroom	4,332	5,834	10,166
4 Bedroom	1,180	918	2,098
5 Bedroom	691	195	886
6+ Bedroom	245	50	295
Total	11,718	13,088	24,806

iii. Number of Households Transitioned to Self-Sufficiency in the Plan Year

HUD requires information on households transitioned to self-sufficiency for any MTW activities that report on HUD's standard metric SS #8. Table 19 below provides the HUD-required information.

Table 19: Transition to Self Sufficiency

MTW Activity Name & Number	Number of Households Transitioned to Self-Sufficiency	MTW PHA Definition of Self Sufficiency
Activity #2016-1: Second Chance Initiative	5	PHA defines self-sufficiency for the Second Chance Initiative as successful completion of the program and transition to other affordable housing.
Activity #2020-1: Local Family Self-Sufficiency Program	67	In the FSS program, self-sufficiency is defined as graduation from the five-year local FSS program.
	0	Households Duplicated Across MTW Activities
	72	Total Households Transitioned to Self Sufficiency

III. PROPOSED MTW ACTIVITIES

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

IV. APPROVED MTW ACTIVITIES

A. Implemented Activities

ACTIVITY 2004-1: NEIGHBORHOOD DEVELOPMENT & REVITALIZATION INITIATIVES

Description/Impact/Update

PHA utilizes MTW authority to substantially increase housing choices for residents and applicants. PHA is continuing to implement an ambitious program of new construction, substantial rehabilitation, and modernization designed to revitalize PHA public housing developments, replace distressed housing lost to demolition and lack of capital funds, and improve Philadelphia's neighborhoods. Public housing development or redevelopment activities directly undertaken by PHA as developer are included under this initiative. To support these redevelopment activities, PHA continues to implement the following MTW components, which also support the Partnership Initiative and other MTW activities:

- Design Standards - PHA continues to implement reasonable and modest design standards for new construction and rehabilitation work that mirror current design trends and the 21st century needs of residents.
- Total Development Cost Limits and Housing Cost Caps - PHA has established and maintains reasonable cost limits for development and redevelopment activities that replace HUD's Total Development Cost (TDC) limits and Housing Cost Caps (HCC).
- Streamlined Mixed-Finance Development Process - PHA is authorized to develop public housing through several financing methods, including the mixed-finance approach, which involves the use of private financing, Housing Choice Vouchers, and public housing development funds.
- MTW Site and Neighborhood Standards - PHA is authorized to implement alternate Site and Neighborhood Standards for its public housing and voucher programs, in lieu of those standards at 24 CFR § 941.202(b)-(d) and 24 CFR 983.57.
- Streamlined Acquisition Process - Subject to the provisions of the MTW Agreement, PHA is authorized to acquire sites without prior HUD approval, provided that the agency certifies that HUD site selection requirements have been met.
- Strategy for Development - PHA has adopted a Development-Asset Management Strategy for Public Housing that takes a comprehensive neighborhood-by-neighborhood and block-by-block approach to redeveloping, consolidating, rehabilitating, demolishing, and acquiring and disposing of scattered site units independently and in partnership with government and other local neighborhood-based organizations.

Approval and Implementation

- Design Standards
 - Approved FY 2004
 - Implemented FY 2004
- Total Development Cost Limits and Housing Cost Caps
 - Approved FY 2004
 - Implemented FY 2004
- Streamlined Mixed-Finance Development Process
 - Approved FY 2004
 - Implemented FY 2004
- MTW Site and Neighborhood Standards
 - Approved FY 2004
 - Implemented FY 2004
- Streamlined Acquisition Process
 - Approved FY 2002
 - Implemented FY 2002
- Strategy for Development
 - Approved FY 2005
 - Implemented FY 2005

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks for this activity.

Metrics:

CE #1: Agency Cost Savings *				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease)	TBD	\$0	N/A	N/A
*PHA has previously noted that this metric is not applicable to this activity; however, HUD has required its use. PHA is not able to derive a baseline for these activities which were initially implemented in FY 2004 (i.e. over 10 years before implementation of HUD standard metrics).				
CE #2: Staff Time Savings *				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	TBD	0	N/A	N/A

**PHA has previously noted that this metric is not applicable to this activity; however, HUD has required its use. PHA is not able to derive a baseline for these activities which were initially implemented in FY 2004 (i.e. over 10 years before implementation of HUD standard metrics).*

CE #3: Decrease in Error Rate of Task Execution *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	0	0	N/A	N/A

**PHA has previously noted that this metric is not applicable to this activity; however, its use is required by HUD. PHA does not track error rates associated with the Neighborhood Development and Revitalization Initiative activities listed above.*

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0	0	275	Yes

HC #2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).	0	0	275	Yes

HC #3: Decrease in Wait List Time *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Public Housing – 14 years for participants housed in FY 2015	TBD	N/A	N/A

**PHA establishes new site-based waiting lists for each new development. The baseline used is the agency wide average wait time for Public Housing. PHA does not know how many applicants will apply for the proposed development(s); therefore, is unable to establish a benchmark for this development at this time.*

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0	0	275	Yes

ACTIVITY 2004-2: SERVICE-ENRICHED HOUSING FOR SENIORS & PEOPLE WITH DISABILITIES

Description/Impact/Update

PHA continued to collaborate with the Commonwealth of Pennsylvania and other local providers to develop and implement a range of service-enriched housing options for seniors and people with disabilities, including the following ongoing MTW program components:

- *Nursing Home Transition* – The Nursing Home Transition Initiative (NHTI) assists persons transitioning out of nursing homes with accessing affordable housing. As part of NHTI, PHA administers up to seventy-five (75) state-supported vouchers/housing opportunities for referrals of disabled consumers in need of low-income housing. NHTI families may be eligible for a preference for public housing or HCV.
- *Definition of Elderly* – An elderly person is defined as an individual who is at least 55 years old. An elderly family is defined as one with a head of household, co-head, spouse or sole member who is at least 55 years old.

During FY 2024, PHA served 57 families under the Nursing Home Transition Initiative. Under this activity, PHA receives referrals to assist persons transitioning out of nursing homes with access to affordable housing through the Public Housing and HCV programs. As of June 30, 2020, the Department of Human Services (DHS) ceased NHTI referrals to the HCV program. However, PHA continued to provide HCV subsidies in FY 2024 to all NHTI participants referred prior to June 30, 2020.

Public Housing continued to partner with the Philadelphia Corporation for Aging (PCA) to receive new referrals for the Nursing Home Transition Initiative in FY 2024; their participation in this initiative was not impacted.

Approval and Implementation

- Nursing Home Transition
 - Approved FY 2010
 - Implemented FY 2010
- Definition of Elderly
 - Approved FY 2004
 - Implemented FY 2004

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks set for this activity.

Metrics:

<i>HC #5: Increase in Resident Mobility</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 – Nursing Home Transition (NHT)	40 - HCV 15 – PH (NHT)	38 – HCV 19 – PH (NHT)	Yes
<i>* Reflects the number of NHT participants assisted through the HCV and Public Housing programs.</i>				
<i>HC #7: Households Assisted by Services that Increase Housing Choice</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0 – Nursing Home Transition (NHT)	40 - HCV 15 – PH (NHT)	38 – HCV 19 – PH (NHT)	Yes
<i>* Reflects the number of NHT participants assisted through the HCV and Public Housing programs.</i>				

ACTIVITY 2004-3: SIMPLIFICATION AND STREAMLINING OF RENT AND RECERTIFICATION PROCESSES FOR PUBLIC HOUSING AND HCV

Description/Impact/Update

PHA continued to implement a series of MTW initiatives in the public housing and/or HCV programs designed to simplify rent calculation and recertification, streamline administrative processes, and reduce paperwork burdens on residents and staff.

- *Two and Three-Year Recertification/Limit on Interims* – Public Housing and HCV, including UBV/RAD require recertifications every two years, except for public housing residents choosing ceiling rents who are recertified every three years. Voluntary interim recertifications are restricted to one every six months, except for elderly and disabled households who are exempt from this restriction. PHA will process voluntary interim rent reductions if and when the reduction in income lasts for more than 30 days. In FY 2017, PHA began conducting recertifications every three years for elderly or disabled households on fixed incomes in both the HCV and public housing programs.
- *Ceiling Rents* – PHA has established ceiling rents for its public housing developments, which are periodically updated. PHA tenants will continue to have the option of selecting either a ceiling rent or an income-based rent. PHA uses ceiling rents when calculating rent for mixed families.
- *Rent Calculation Method* – PHA has established an alternative rent structure for the HCV (including UBV/RAD) and public housing programs to motivate residents to work and accumulate savings. In FY 2017, PHA began allowing households with assets of \$50,000 or less to self-certify asset value and income from the assets. Asset income is excluded when the value of the household's asset is \$50,000 or less. Asset income for household assets valued at greater than \$50,000 is calculated by using the market value of the asset times the passbook savings rate. Also, in FY 2017, PHA began excluding all full-time student earned income for family members other than the head, spouse or co-head and PHA discontinued verification of full-time student earned income as 100% of the income is excluded.
- *Verification and Calculation of Earned Income* - PHA is authorized to implement a revised method for verifying and calculating earned income for Public Housing participants. Specifically, PHA will verify and calculate earned income using the last four consecutive quarters in EIV. In cases where earned income is not in EIV or the tenant disputes the earned income calculation, PHA will seek third party verification to verify and calculate income and/or reconcile the difference. PHA will continue to use third party verification for unemployment as well as other sources of income not contained in EIV. Where the working family deduction is concerned, family members who report employment income will self-certify the number of hours they work each week.
- *Payment Standards* – PHA has implemented a policy in the HCV program whereby the current payment standard is applied at regular recertification; however, this policy was modified due to required regulatory implementation of SAFMRs. Additionally, PHA approved payment standards up to 120% of the FMR to support leasing for existing voucher clients and/or new

voucher holders who wish to move to areas with documented improved educational systems, job opportunities, social services and other opportunities in the expectation that over time their need for housing and other subsidies will abate or diminish.

- *Exception Payment Standards* - PHA is authorized to establish exception payment standards for individual units within a SAFMR zip code and remove the 120% limitation for units in neighborhoods undergoing significant revitalization where the SAFMR is not consistent with its property values and rents. In FY 2023, PHA also received approval to establish exception payments standards for specific areas of revitalization, identified by blocks, groups of blocks, or other geographic areas, also removing the 120% limitation for such areas. While all of the units in the zip code with the lower SAFMR may not be in the revitalized area, those that are, would be at a significant disadvantage for inclusion in the HCV program if existing SAFMRs and payment standards were applied. These changes will provide PHA with additional flexibility to establish exception payment standard areas and aligns with PHA's broader strategy to encourage voucher-holders to lease in areas of opportunity and decrease density in high poverty neighborhoods. Exception payment standards will be consistent with market conditions in the surrounding area and prevent financial hardship for those voucher-holders who choose to lease in these areas. As with all other HCV units, PHA will include documentation in the file that the rent is reasonable when setting payment standards outside of the allowable range without HUD approval.
- *Reasonable Rent*
 - PHA has implemented a reasonable rent policy for the HCV Program, including UBV/RAD, whereby reasonable rent determinations are completed at initial lease up, upon request for a rent increase, and at other times PHA deems it necessary to conduct a reasonable rent redetermination.
 - PHA may implement across-the-board rent increases or rent freezes for properties in the HCV Program. When and if an across-the-board rent increase is awarded, PHA will complete a reasonable rent determination at the time of the next annual HQS inspection and apply applicable policies related to reasonable rent when and if the rent is not reasonable.
- *Utility Allowances*
 - PHA is authorized to implement a revised utility allowance methodology that includes the following components:
 - HCV participants who are responsible for paying gas heat and who are eligible to participate in the PGW Customer Responsibility Program (CRP) have the gas portion of their utility allowances calculated using an alternative methodology. PHA may elect to implement this utility allowance program in public housing where applicable.
 - PHA will periodically, at its discretion, review HCV utility allowance schedules to determine if adjustments are required. Annual updates are not required.
 - Utility allowances may be phased out for residents with incomes at or above 80% of Area Median Income or public housing residents on ceiling rent.

- PHA will review and modify public housing utility schedules periodically based on an assessment of available HUD funding and the requirements of the MTW Agreement and Plan.
- PHA is also authorized to expand the utility allowance policy to require public housing and HCV tenants receiving either heat or electric utility allowances to enroll and participate in the PECO Customer Assistance Plan, LIHEAP and any other applicable programs that offer reduced rates, energy usage grants, or other financial incentives to low-income households.
- For HCV participants only, during an interim recertification, PHA will apply the utility allowance in effect on the effective date of the interim recertification; however, families on the Alternate Utility Allowance (UA) CRP Program will have their gas utility allowance updated at the time of interim recertification consistent with PHA's MTW UA policies. During an interim recertification, PHA will apply the payment standard in effect at the last regular recertification.
- PHA is also authorized to expand the utility allowance policy to require public housing and HCV tenants, whose incomes are at or below 150% of the Federal Poverty Level and who receive a utility allowance for water, to enroll and participate in the Philadelphia Water Department's Tiered Assistance Program (TAP). TAP provides customers with significant savings by offering a consistent bill based on their income. PHA will base the water utility allowance for eligible households on the amount charged under the TAP Program. Water charges range from 2% to 3% of gross income.

PHA may apply the rent and recertification policies noted above to Public Housing households who are living in housing operated by PAPMC, subject to investor approval as needed.

PHA has not yet implemented flexibility to require families to enroll in the TAP or PECO programs. In FY 2024, PHA continued to conduct outreach to landlords to inform them of the benefits and requirements of the TAP program, including permitting tenants to be responsible for payment of water utilities.

PHA adopted Small Area Fair Market Rents (SAFMR) beginning in FY 2019 with revisions to the groupings of SAFMR zip codes in FY 2020. These revisions were necessary to avoid a negative financial impact on both tenants and owners. With implementation of SAFMRs, HCV participants have greater opportunity to rent in opportunity neighborhoods. To encourage participants to move to high-opportunity zip codes where contract rents may be higher, the Housing Opportunity Program (HOP) assists voucher-holders in searching for a unit in these neighborhoods. In FY 2024, 60 families successfully leased up in high-opportunity neighborhoods through support from the HOP program.

Approval and Implementation

- Two and Three-Year Recertification/Limit on Interims
 - Approved FY 2004
 - Implemented FY 2004

- Ceiling Rents
 - Approved FY 2004
 - Implemented FY 2004
- Rent Calculation Method
 - Approved FY 2004
 - Implemented FY 2004
 - Modified FY 2017
- Payment Standards
 - Approved FY 2008
 - Implemented FY 2008
- Reasonable Rent
 - Across-the-board Rent Increases
 - Approved FY 2008
 - Implemented FY 2008
 - Streamline Reasonable Rent Determinations
 - Approved FY 2005
 - Implemented FY 2005
- Utility Allowances
 - PGW CRP Program
 - Approved FY 2009
 - Implemented FY 2014
 - PECO Customer Assistance Plan Enrollment
 - Approved FY 2011
 - Not yet implemented
 - Interim Recertification Utility Allowance
 - Approved FY 2017
 - Implemented FY 2017
 - Philadelphia Water Department's Tiered Assistance Program (TAP)
 - Approved FY 2019
 - Not yet implemented
- Minimum HAP Payment
 - Approved FY 2019
 - Implemented FY 2019

Hardship

PHA has adopted a hardship policy which considers exceptions to all of PHA's rent and utility allowance policies on a case-by-case basis for families who can demonstrate a long-term hardship that will result from application of the policies to them, or as a reasonable accommodation. Hardship exemption requests must be submitted in writing and explain the nature of the hardship and include any applicable documentation.

In FY 2024, PHA received 16 hardship requests related to this activity and 15 requests were approved.

Actual Non-Significant Changes

In FY 2024, PHA received approval from HUD to implement a policy to exclude 100% of income which a family receives from a guaranteed income program intended to support financial stability. Only guaranteed income programs reviewed and approved by PHA will be eligible for this exclusion. Such income is temporary and thus excluded. This policy will apply to both HCV and Public Housing programs.

Additionally, PHA increased the verification discrepancy threshold to \$5,000 in FY 2024. PHA will continue to identify income discrepancies and take action to process discrepancies which may result in interim or annual correction actions; however, the threshold for the discrepancy will be set at \$5,000.

In FY 2024, PHA made the following additional changes to verification policies for the HCV and Public Housing programs:

- Applicants and Participants: PHA will accept verification documents dated within 180 days of the date they are provided to PHA.
- Fixed Sources of Income: Verification documents for fixed income sources will be valid for the full calendar year in which the income is effective. For example, if a Social Security benefit letter is dated February 1, 2022, that benefit letter will be valid for any certification with an effective date in 2022.

Finally, in FY 2024, PHA revised the HUD Verification Hierarchy for both HCV and Public Housing programs. Under the existing HUD Income Verification Hierarchy, PHA is required to request and to document attempts to obtain written third-party verification, written third party forms, and oral verification prior to relying on a tenant declaration. PHA's modified Income Verification Hierarchy allows PHA to rely on any of the third-party verification methods before accepting self-certification. This process streamlines the verification process and allows PHA to repurpose staff time on tasks outside of verification.

Level	Verification Technique	Ranking
1	Upfront Income Verification using HUD's EIV and IVT	Highest (Mandatory)
2	Upfront Income Verification using non-HUD system	Highest (Optional if available and procured by PHA)
3	Written Third Party Verification; Written Third Party Verification Form; or Oral Third Party Verification	High <ul style="list-style-type: none"> • Supplements EIV and UIV • Also used for: <ul style="list-style-type: none"> ○ Non-EIV/UIV reported income sources ○ Disputes of EIV reported information
4	Tenant Declaration	Low <ul style="list-style-type: none"> • To supplement EIV when EIV reported sources do not contain verification of the full retrospective period where applicable; or • When tenant cannot produce written third party verification documents.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks for this activity.

Metrics:

<i>CE #2: Staff Time Savings*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	56,110 hours (estimate)	29,000 hours	28,529 hours	Yes
<i>*Includes regular and interim recertifications for both HCV and PH programs; assumes each recertification takes approximately 1.5 hours to complete.</i>				
<i>CE #3: Decrease in Error Rate of Task Execution *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	5%	5%	0% - PH 5% - HCV	Yes
<i>* The error rate for Public Housing is based on an independent audit; HCV's error rate is based on Quality Control reviews. PHA implemented its revised rent calculation method in 2004 and did not have historical data on rent calculation error rates at that time. PHA identified the baseline as part of the FY 16 Annual Report (which already reflects error rate reductions) and then established a benchmark of maintaining this level going forward, i.e. PHA would not anticipate future reductions to error rates.</i>				
<i>CE #5: Increase in Agency Rental Revenue – Utility Allowance Policy*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	\$606,753	\$606,753	\$683,838	Yes
<i>*Represents the total amount of monthly utility allowances provided to households who are eligible to receive the CRP UA for gas heat.</i>				

ACTIVITY 2004-4: UNIT-BASED LEASING AND DEVELOPMENT PROGRAM

Description/Impact/Update

Under PHA's Unit-Based Leasing and Development Program ("UBV" or the "Unit-Based Program"), PHA continued to negotiate long-term subsidy contracts with for-profit and non-profit private sector housing providers based on property specific agreements. PHA prioritizes the selection of developments, which serve underserved populations and/or which incorporate supportive services on-site or nearby. Key features of PHA's UBV Program include:

- PHA's Site Selection Standards for the UBV Program comply with the alternate Site and Neighborhood Standards described at Attachment C, Section D (7)(c) to PHA's MTW Agreement.
- Rents to owners participating in the UBV Program funded with MTW HCV funds do not exceed the lowest of 110% of the applicable fair market rent, the reasonable rent, the rent requested by the owner or such other amount determined by PHA to be appropriate for the unit based upon the nature of the unit and the RFP from which the owner was selected. For example, in certain cases, PHA may determine that a shallow subsidy is more appropriate.
- Unless part of its "shallow" subsidy UBV Program, PHA does not attach or pay UBV assistance to units that are already receiving another form of subsidized housing operating assistance. With respect to a shallow subsidy UBV Program, PHA does not attach or pay UBV assistance to units receiving another form of subsidized operating assistance if the UBV assistance would be duplicative or would otherwise over-subsidize the unit. PHA may determine the effect of subsidy on rent to owners and the duplication of subsidy or excessive subsidy, subject to the requirements regarding subsidy layering as set forth in the HUD Reform Act of 1989.
- PHA may unit-base up to 100 percent of the dwelling units in any UBV project or building.
- PHA may select its own units for project-basing with UBV assistance without a competitive process. Pursuant to Attachment C, Section D (7)(a) of PHA's MTW Agreement, PHA may unit-base assistance at properties other than public housing properties owned directly or indirectly by PHA, including those owned by PHA affiliates or instrumentalities. For purposes of this selection method, a property that may be unit-based may be a former public housing property that has been converted to HCV assistance.
- Pursuant to Attachment C, Section D (1)(f) of PHA's MTW Agreement, under either the UBV Program or the Partnership Initiatives, PHA may attach or pay UBV assistance using HCV MTW funds to unit types currently prohibited by standard Section 8 regulations including, but not limited, to shared living facilities. Such units must comply with applicable alternate MTW Site and Neighborhood Standards. In February 2017, with the support of the local Veterans Administration, PHA requested HUD approval to enter into a HAP contract under the HUD VASH-PBV Program for an existing, 14-unit shared housing facility (Hancock Manor) operated by Impact Services. HUD accepted PHA's use of the existing MTW waiver related to shared living facilities in project-based developments for this VASH project.

Subject to HUD approval and the support of the VA, PHA may apply MTW waivers related to shared housing facilities in project-based developments to future VASH projects.

- An owner of a unit assisted under the UBV Program with MTW HCV funds may elect to receive referrals from PHA's waiting list or to use a site-based waiting list for selection of tenants for a site. For owners using a site-based waiting list, PHA reviews and approves the tenant selection plan, and owners refer families to PHA for eligibility screening.
- A family residing in a UBV unit funded with MTW HCV funds may terminate the lease at any time after the initial term. The family must give advance written notice to the owner in accordance with the lease and provide a copy of such notice to PHA. Once a family terminates the lease, the family will no longer be part of the HCV or UBV Program. Pursuant to PHA's MTW flexibility, PHA does not provide UBV participant families who want to move with tenant-based assistance with a tenant-based HCV voucher, except where required under the RAD Program or otherwise offered by PHA as a reasonable accommodation, VAWA transfer or due to HQS failures under certain circumstances.
- While PHA's standard initial lease term for public housing and HCV is two years, PHA may allow a shorter term for UBV transitional housing units in order to facilitate the movement of families through the housing continuum and to obtain "permanent" housing more rapidly.
- PHA applies its MTW UBV policy to RAD developments and may project-base 100% of the units in a RAD UBV development.
- PHA is not subject to the requirement for an independent entity to approve AHAP/HAP contract terms, renewals of HAP contracts, rent determinations and inspection of PHA owned units.
- PHA applies the following MTW initiatives to the UBV/RAD Program: Rent Simplification, two and three year recertifications, limit on interim recertifications, alternative rent structure and reasonable rent.
- PHA may utilize local forms, which reflect PHA's MTW UBV policies and procedures as an alternative to HUD standard forms. For example, PHA will prepare a local PB HAP contract and PB Tenancy Addendum to reflect MTW policies including but not limited to, rent determination methods, recertification frequencies and right to move policies.
- PHA defines a UBV project as a single building, multiple contiguous or non-contiguous buildings, or multiple buildings on contiguous or non-contiguous parcels of land all with a single owner. A single family building is a building with no more than four dwelling units. PHA may elect to combine units that cumulatively meet the definition of a UBV project, but that are covered under more than one Housing Assistance Payments (HAP) Contracts, into a single HAP Contract. For such scattered site projects, PHA implements an alternative method to determine rent reasonableness whereby PHA bases the rent reasonableness determination for all units in the project that are within the same submarket area on the rent reasonableness determination made for a single unit of each bedroom size.

For example, the rent reasonableness determination for all one-bedroom units in the project will be based on the rent reasonableness determination made for a single one-bedroom unit in the project provided that the units are in the same submarket area.

For mixed-finance closings for UBV units involving new public housing units, PHA may request HUD review and approval of certain waivers to current public housing regulations in the interest of increasing housing choice, promoting long-term project viability, and encouraging more third-party development. Specific waivers that may be requested include:

- PHA may elect to allow the owner of UBV units, including PHA if it is the owner, to utilize public housing operating subsidy and other MTW funds, to pay for debt service associated with the UBV development; and,
- Where PHA provides public housing operating subsidy as part of UBV assistance, separately or in combination with voucher or other MTW funds, PHA may have the Declaration of Restrictive Covenants modified to eliminate or change the standard ten-year affordability “tail.”

The specific details of each UBV agreement are defined prior to closing and shall be subject to HUD review and approval, where applicable, as part of the mixed-finance transaction closing process.

In FY 2024, PHA entered into UBV contracts for seven (7) properties resulting in 250 new UBV housing opportunities, in addition to providing continuing subsidy for 4,472 UBV units.

Approval and Implementation

- Approved FY 2004
- Implemented FY 2004
- Modifications in FY 2017, FY 2019

Hardship

PHA will provide a tenant-based voucher to a UBV tenant as a result of extended HQS failures. PHA may offer a tenant-based voucher to a UBV tenant who has successfully completed the FSS program and has been deemed eligible for a Homeownership Voucher. In extenuating circumstances and subject to funding availability, PHA may offer tenant-based assistance according to the hierarchy of UBV transfers, for households requiring:

- Transfers due to Personal Safety/VAWA/Other Emergency;
- Reasonable accommodation transfers.

In FY 2024, three (3) hardship requests were approved related circumstances in which tenant-based vouchers were issued to UBV participants.

Actual Non-Significant Changes

In FY 2024, PHA began planning and preparation for the conversion of its Public Housing scattered sites units to the UBV program in order to protect the long-term viability of this portfolio.

This conversion may occur through the Section 18 disposition, the RAD conversion process or a Section 18/RAD blend. PHA received approval from HUD in FY 2024 to modify eligibility and rent policies for households occupying Public Housing scattered site units at the time they are converted through either Section 18 or RAD. Specifically, PHA will apply the following policies to mitigate financial burdens and prevent dislocation:

- At conversion, PHA will not re-screen households for eligibility in the HCV program. Current households will be grandfathered for application of any eligibility criteria to conditions that occurred prior to the conversion, but will be subject to on-going eligibility requirements of the UBV program. If the current household moves out after conversion, any family that leases the unit thereafter will be subject to UBV eligibility requirements at initial and during continued occupancy.
- PHA will place units under HAP contract for current households whose total tenant payment (TTP) exceeds the gross rent of the unit. Current households whose TTP exceeds the gross rent will be required to pay the gross rent or the maximum rent under LIHTC, if applicable, while leasing the converted unit. If the current household moves out after conversion, PHA will only lease the unit to a family who is eligible for housing assistance payments and whose total tenant payment (TTP) is below the gross rent for the unit.
- If, at conversion, the current household is considered over-housed under PHA's subsidy standards, the current household will be permitted to remain in the converted unit until an appropriately sized unit becomes available within converted project. Once an appropriately sized unit is available, the current household must move within a reasonable amount of time, as determined by PHA. Households who are admitted after the conversion will be subject to PHA's subsidy standards at initial occupancy.
- If, as a result of the conversion, the current household's monthly rent will increase by more than the greater of 10 percent or \$25, the rent increase will be phased in over three (3) years. If a current household was paying ceiling rent immediately prior to conversion, PHA will use the ceiling rent amount to calculate the initial (Year 1) phase-in amount.

Please note that modified eligibility and rent policies detailed above will not apply to families who are admitted and move into these units after conversion.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

Benchmarks were updated to reflect UBV activity in FY 2024.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmarks for HC #1 and HC #5, as fewer new UBV projects were under AHAP or HAP than anticipated as of the end of FY 2024.

Metrics:

HC #1: Additional Units of Housing Made Available *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0 units	589 units	216 units	No

**HUD requires this metric to track only newly constructed and/or rehabilitated units that were put under HAP Contract during the Plan year. This excludes planned RAD conversions of existing public housing including PAPMC-managed units; however, it does include any newly constructed or substantially rehabilitated RAD conversion units.*

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 households	873 households	250 households	No

** Represents units project-based voucher units newly under HAP or AHAP in FY 2024.*

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0 households	2,230 households	2,362	Yes

** Represents UBV units where supportive services are provided.*

ACTIVITY 2005-2: STREAMLINE THE ADMISSIONS AND TRANSFER PROCESS

Description/Impact/Update

PHA continued to implement MTW policies designed to streamline the admissions and transfer policies and processes for both Public Housing and HCV Programs. All approved features of this activity have been implemented.

- *MTW Transfers* - PHA may authorize a limited number of split-family transfers from Public Housing to the Housing Choice Voucher program and vice versa. These transfers are referred to as MTW transfers. PHA provides for up to 50 Housing Choice Vouchers and 50 public housing units to be transferred back and forth between the Public Housing Program and the HCV Program. No more than 100 moves are authorized per fiscal year.
- *HCV Waiting List* - Once a family is leased under the HCV Program, the family may remain on the waiting lists for Tax Credit and public housing sites; however, PHA notifies the family that they will not be eligible for selection from the Tax Credit or public housing site waiting lists until the initial lease term has been completed.
- *Public Housing Waiting List* - Once a family is housed in Public Housing, the family will be removed from all other scattered site and conventional public housing waiting lists. However, a family may remain on the HCV and/or Tax Credit Site waiting lists. Additionally, PHA may require that the family sign an agreement whereby the family acknowledges that their name will be removed from all other scattered site and conventional public housing waiting lists and they will not be eligible for selection.

PHA may allocate homeownership vouchers for Public Housing residents who graduate from the Jobs Plus program and transfer these residents from the Public Housing to HCV Homeownership program. Graduates will be required to complete the homeownership-counseling courses and meet other eligibility requirements for receiving a homeownership voucher.

In FY 2024, 30 households were approved for an MTW transfer. Of those approved to transfer from PH to HCV, six (6) were leased as of the end of the fiscal year and seven (7) are still searching for a unit. Seventeen families successfully transferred from the HCV program to Public Housing.

Approval and Implementation

- MTW Transfers
 - Approved FY 2005
 - Implemented FY 2005
- HCV Waiting List
 - Approved FY 2012
 - Implemented FY 2012
- Public Housing Waiting List
 - Approved FY 2012
 - Implemented FY 2012

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

Please note that PHA may propose to remove and replace this metric in future MTW Plans, as participants who are approved for an MTW transfer are not added to a transfer waiting list. Upon approval, participants are issued a voucher or offered a unit in Public Housing as soon as they are available.

Metrics:

<i>HC #3: Decrease in Wait List Time – MTW Transfers</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease). *	PH – 14 years in FY 2015	PH < 1 year	PH < 1 year	Yes
	HCV – 4.5 years in FY 2015	HCV < 1 year	HCV < 1 year	

ACTIVITY 2005-3: PROGRAM EFFICIENCIES *(Formerly HCV Program Efficiencies)*

Description/Impact/Update

PHA continued to implement additional efficiencies in the HCV Program designed to simplify processing and streamline administrative processes. This activity includes:

- *Restriction on Elective Moves* – Families are permitted to move within PHA's jurisdiction after the initial term of assisted occupancy and at the time of regular recertification.
- *Criteria for Portability Moves* – PHA has established criteria for all port-out moves. The criteria require that MTW voucher participants requesting to port-out provide a verified employment, education, safety, or medical/disability need to support their move to another jurisdiction.
- *Development of Local Forms* - PHA will prepare local forms, which reflect PHA's MTW policies and procedures.

As part of the Local Forms initiative, PHA combined the HUD-9886 Authorization for the Release of Information/Privacy Act form with the PHA Authorization of Release Form in order to reduce redundancies and streamline the verification process by reducing the number of signatures required and allowing the household to sign electronically. In FY 2024, PHA further updated the local version of the combined the HUD-9886 Authorization for the Release of Information/Privacy Act form for consistency with HUD's changes to the standard version of the form, revising the information related to form's expiration. PHA also developed a local HAP Contract and Tenancy Addendum as part of the Local Forms initiative. The new HAP contract is integrated in the PHA's landlord portal system to streamline and expedite the leasing process.

In FY 2024, a total of 2,083 families were approved to transfer to new HCV units under the elective moves portion of this activity. Of those approved to transfer, 64 were approved for a transfer as a result of VAWA protections or safety concerns, and 11 were approved for Reasonable Accommodation. Where portability is concerned, PHA received 337 port out requests, of which 194 were approved. The following is a summary of the approved port-out requests for FY 2024:

- 7 based on education
- 58 based on employment
- 49 based on medical or disability
- 80 based on safety

Approval and Implementation

- *Restriction on Elective Moves*
 - Approved FY 2008
 - Implemented FY 2008
- *Criteria for Portability Moves*
 - Approved FY 2013
 - Implemented FY 2013

- Development of Local Forms
 - Approved FY 2017
 - Implemented FY 2017

Hardship

Not applicable. This is not a rent reform activity.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics identified in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet Staff Time Savings benchmarks for elective moves, as the volume of elective moves was higher than in previous fiscal years.

Metrics:

<i>CE #2: Staff Time Savings</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Restriction on Elective Moves: Total time to complete the task in staff hours (decrease).	1,614 hours (based on 1,291 moves in FY 14)	2,500 hours	2,604 hours	No
Criteria for Portability Moves: Total time to complete the task in staff hours (decrease).	540 hours (based on FY 12 port activity)	264 hours	243 hours	Yes
<i>*PHA implemented this activity in FY 2007 and does not have baseline information available for that period. Thus, the baseline reflects staff time savings already achieved. PHA has established a benchmark to continue the same or comparable level of staff time savings. PHA assumes that staff spend approximately 1.25 hours to complete an elective move or portability move.</i>				

ACTIVITY 2011-1: PARTNERSHIP PROGRAMS INITIATIVE

Description/Impact/Update

PHA continued to utilize MTW authority to expand public housing for special needs and other targeted groups in partnership with non-profit neighborhood groups, universities, state and local government, and other stakeholders. This flexible, services-oriented model allows PHA to leverage PHA and partner resources to provide public housing options and, where appropriate and feasible, related health care, educational, and/or other necessary services to low-income families and individuals. Authorized features of this initiative include, but are not limited to, the following:

- Admissions and continued occupancy requirements for the initiative may vary from standard public housing and will be determined for each project in order to promote seamless integration of the partner's subsidy sources with MTW funds.
- Partnership initiatives must serve households earning 80% of AMI or below. PHA's MTW funds may not be used to subsidize households who are not low-income.
- PHA will leverage its funds with other partner resources in order to avoid duplicative services and payments and to maximize the value of funds invested in the Partnership Initiative.
- Potential models include, but are not limited to, domiciliary care for seniors and people with disabilities; housing options for youth, including those aging out of foster care; and permanent supportive housing.
- Budgets and agreements between PHA and its partners will adjust subsidy to allow for recoupment of PHA's capital investment as fee income where financially feasible, particularly in situations in which the partner's subsidy is intended to cover all or some of the housing costs.
- While each development is expected to have different features, programmatic components may include: preferences for specific target populations, including referrals from partner agencies; program contracts for participants that may include requirements for case management, participation in services, or other requirements; time limits on housing subsidies; modified occupancy standards; availability of stipends; and other components.

Under this activity, construction of seven (7) new Public Housing developments, consisting of 275 units, was completed in FY 2024. An additional 560 Public Housing units at 12 developments were in various stages of planning and/or construction as of the end of FY 2024. Pursuant to PHA's FY 2024 MTW Plan, some or all of these developments may be converted to project-based assistance under the Faircloth-to-RAD initiative or RAD transfer of assistance.

Approval and Implementation

- Approved FY 2011
- Implemented FY 2012
- Modified FY 2013 to incorporate specific components applicable to the youth aging out of foster care partnership with the Philadelphia Department of Human Services (DHS)

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics identified in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

As noted above, PHA is working with developers on 12 additional Public Housing developments consisting of 560 units; however, these developments were still under development as of the end of the fiscal year.

Metrics:

<i>HC #1: Additional Units of Housing Made Available *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0	429	275	No

** The HUD Standard Metrics for this activity will depend on the MTW flexibilities required and the type of service provided at each site. As additional agreements with developers and/or service providers are finalized, further HUD Standard Metrics may be added depending on the terms and necessary flexibilities of the agreements. None of the listed projects for FY 2023 require MTW waivers at present other than the use of MTW funds.*

ACTIVITY 2016-1: SECOND CHANCE INITIATIVE

Description/Impact/Update

PHA continued to utilize MTW flexibility to support implementation of the Second Chance Initiative in the Housing Choice Voucher Program. The policy permits the provision of tenant-based vouchers for active participants in good standing with two partner agencies – the Eastern District Federal Court Supervision to Aid Reentry (STAR) Program and the Mayor’s Office of Reintegration Services (RISE) Program. The STAR Program works in conjunction with Federal Probation and Parole, to offer returning citizens an opportunity to reduce their parole period by one year through participation in the Re-Entry Program. Each participant signs a contract with their parole officer to transition the oversight of their parole to the two federal judges that administer the STAR Program. The STAR Program collaborates with the local RISE Program to provide counseling, education, job training, and job placement services. In the 2017 Annual Plan, PHA indicated that placements in public housing units may be offered to Second Chance participants in good standing at PHA’s option.

Housing assistance is available to the participants for a period of up to two years, at which point the objective is for participants to transition off the program to other affordable housing. However, PHA may allow Second Chance participants to transition to the HCV or Public Housing Program to continue their tenancy.

In FY 2018, PHA entered into a new partnership with the Pennsylvania First Judicial Court’s MENTOR Program. This initiative allows 20 qualified returning citizens who are working with the MENTOR Program to move in with existing PHA public housing households, provided that the PHA household is in good standing and is willing to add a MENTOR Program participant to the lease. This will help to re-unite families, prevent homelessness and, hopefully, interrupt the cycle of recidivism. While the initiative allows for return of 20 qualified citizens, enrollment in this program is based on referrals from the MENTOR Program.

In FY 2024, PHA continued to provide for extensions to the two-year term for the STAR/RISE programs in order to address the continued economic impact of the COVID-19 pandemic. Extensions are granted on a case-by-case basis and evaluated based on the participant’s individual circumstances which have been dictated by such declared emergency.

Thirteen (13) participants were enrolled in the STAR Program including six (6) new participants who enrolled in the program during the fiscal year. To support housing stability, two (2) participants were granted an extension of their program participation term.

The story of a current participant in the STAR program illustrates how the combination of housing and supportive services can transform the lives of returning citizens. Upon release, the participant lacked the support network to find a stable home and struggled to access critically needed benefits including financial support and access to medical care without a stable home. The STAR program offered not only a stable, furnished and clean home, but the opportunity to secure benefits from Social Security, the Philadelphia Corporation for the Aging and Pennsylvania Health and Wellness.

Approval and Implementation

- Approved FY 2016
- Implemented FY 2016
- Modified FY 2018

Hardship

Not applicable.

Actual Non-Significant Changes

The MENTOR Program did not receive any referrals during the term of PHA's partnership and agreement with the Pennsylvania First Judicial Court. Where the goal of this initiative was to reunite families and prevent homelessness and recidivism, PHA was bound by its policies regarding program denial for certain drug and violent criminal offenses. In FY 2024, PHA discontinued the partnership with the Pennsylvania First Judicial Court.

PHA increased the number of tenant-based vouchers allocated to the STAR and RISE programs in FY 2024 to expand opportunities to serve this population.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics identified in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet benchmarks for program participation, employment, job training and education. Because of program turnover (the STAR program exceeded the benchmark for graduations and enrolled six (6) new participants during the fiscal year), nearly half of participants enrolled in the program in the last 12 months. PHA provides new participants who are not yet employed with support for job placement and/or accessing job training or education.

Metrics:

<i>HC #5: Increase in Resident Mobility</i>				
Unit of Measurement	Baseline	Benchmark*	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0	30	13	No
<i>*Represents the STAR/RISE programs. Mentor program referrals cannot be forecasted.</i>				
<i>SS #3: Increase in Positive Outcomes in Employment Status *</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Employed Full-Time*	10 participants	18	7	No
	100% of participants	60%	54%	

Enrolled in a Job Training Program	0 participants	6	2	No
	0% of participants	20%	15%	
Enrolled in an Education Program	0 participants	6	1	No
	0% of participants	20%	8%	

**Represents participants in the STAR/RISE programs only. All participants in the STAR/RISE programs are required to be employed and maintain employment as a condition of participation; however, in the event they lose employment, they will be required to either obtain a new job or enroll in an educational or job training program as a condition of participation.*

SS #5: Households Assisted by Services that Increase Self-Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0	30	13	No

SS #8: Households Transitioned to Self Sufficiency *

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0	2	5	Yes

**For this program purpose, PHA defines "self-sufficiency" as successfully completing the program and transitioning to other affordable housing. Represents STAR/RISE participants only.*

ACTIVITY 2019-1: OPENING DOORS TO AFFORDABLE HOMEOWNERSHIP

Description/Impact/Update

PHA continued to utilize MTW funding and programmatic flexibility to expand first-time affordable homeownership initiatives to increase housing choice and the number of first-time, low-income homebuyers. The program builds on the existing framework and consolidates PHA's existing HUD-approved 5h Homeownership Program, HCV Homeownership Program, other new development homeownership initiatives and homeownership readiness and counseling support under the management of PHA's Homeownership Department. Further, this activity expands PHA's existing programs to incorporate new types of assistance including lease-purchase and down payment assistance options.

Under the existing 5h Program, PHA assists current public housing residents of scattered site units to purchase their own units; however, the program is limited to current residents of the unit and does not incorporate post-purchase voucher assistance. Under the existing HCV Homeownership program, current voucher participants may utilize their voucher assistance to purchase homes and then receive monthly Housing Assistance Payments to support housing costs for up to a fifteen (15) or thirty (30) year period.

The MTW Opening Doors to Affordable Homeownership Program (ODAHP) consolidates, streamlines and enhances these existing initiatives while modifying eligibility and post-purchase support criteria and adding new financing support mechanisms. Key features of the program include:

Program Components

ODAHP participants work with PHA's Homeownership Department to review their financial status, credit standing and household goals. Participants are required to meet all eligibility requirements, including successful completion of approved homeownership counseling and financial literacy courses. Financing options available to program participants include:

- *Monthly voucher assistance:* Households may receive monthly Housing Assistance Payments assistance for up to 15 or 30 years. Generally, this assistance will cover the difference between up to 28% of adjusted household income and the projected monthly homeownership costs, subject to a cap that is equal to PHA's voucher payment standard. PHA's rent simplification policies will be utilized to calculate household adjusted income and tenant monthly payments. Households will be recertified on a biennial basis per PHA's existing policy. Per PHA's MTW policy, assistance will be ended 180 days after a household income rises such that the PHA subsidy equals \$50 or less. Monthly voucher assistance may be used for private market units as well as for PHA scattered site units following sale. However, PHA will record a soft second mortgage on the title with a 15 or 30-year period, which is related to the voucher assistance term. In the event of a default, PHA will receive notification and attempt to work with the household to develop a financial workout plan to avoid foreclosure.
- *Down payment assistance:* In lieu of receiving monthly voucher assistance, ODAHP participants will be eligible for one-time down payment assistance up to a maximum of

\$15,000 per household. Participants receiving down payment assistance will not be recertified. However, PHA will record a soft second mortgage on the title with a 20-year recapture period. In the event of a default, PHA will receive notification and attempt to work with the household to develop a financial workout plan to avoid foreclosure. If the default is not cured, PHA will recoup the down payment assistance amount, which will decrease 5% annually over the 20-year term.

- *Soft second mortgage option:* Up to a maximum of \$50,000 per household may be provided as a soft second mortgage, provided that the household is not receiving other PHA homeownership assistance. Participants receiving this assistance will not be recertified. However, PHA will record a soft second mortgage on the title with a 20-year recapture period. In the event of a default, PHA will receive notification and attempt to work with the household to develop a financial workout plan to avoid foreclosure. If the default is not cured, PHA will recoup the soft second mortgage amount, which will decrease 5% annually over the 20-year term.
- *Lease to purchase option:* PHA is authorized to implement lease to purchase options that can be implemented in private market rentals and scattered sites that are still part of PHA's public housing inventory. A portion of the tenant rent will be escrowed during the lease to purchase period and then applied to the down payment at the time of purchase. Lease to purchase participants will be recertified per PHA's existing policy.
- *Rehabilitation of Scattered Sites Units* – Leveraging the Federal Housing Administration's 203(k) Rehabilitation program, PHA may offer down payment and soft second mortgage assistance to PH residents and HCV participants who purchase and rehabilitate select scattered site units. With a Section 203(k) insured loan, PH residents and HCV participants will be able to finance the rehabilitation of the unit. PHA will qualify and connect residents with MBE/WBE contractors as well as resident-owned contracting companies to facilitate the rehabilitation. During the period of rehabilitation, HCV and PH participants will continue to receive assistance in their existing (non-homeownership) PH or HCV units until rehabilitation work is complete and the homeownership unit is ready for move-in.

As with the 5h Program, all scattered site units are eligible for sale to ODAHP participants without requiring additional HUD disposition approval.

For the down payment assistance and soft second programs, PHA has established reasonable maximum limits of \$15,000 and \$50,000. These amounts were determined based on PHA's internal assessment of the level of assistance needed to ensure successful first-time homeownership among current program participants given current Philadelphia housing market conditions. Note, however, that PHA will authorize only the minimum amount needed to close the affordability gap based on individual household circumstances. PHA will calculate the maximum mortgage payment allowed at 35% of adjusted monthly income, and total housing expenses at 38% of adjusted monthly income. The amount of down payment or soft second assistance to be provided by PHA will be calculated by PHA's Homeownership Opportunities Department staff based on a complete review of household finances. As part of this review, PHA staff will work to

maximize household eligibility for any other non-PHA down-payment and/or closing cost assistance programs.

PHA budgets approximately \$1.5 million in MTW funds yearly to support the program. The number of households served varies, depending on the mix of financing options utilized by participants. If demand exceeds available budget, PHA will establish a wait list based on date and time of application.

To date, PHA has assisted over 1,000 families in purchasing their first home, including 254 families who purchased their scattered site unit through the 5(h) program and 756 families who purchased a home through the HCV Homeownership program. In FY 2024, 49 families were able to purchase a home through the ODAHP program, including:

- 17 families who purchased a home through the HCV Homeownership program
- 14 families who purchased a home through the Public Housing 5(h) program
- 18 families who purchased a home through the new Public Housing Mobility program

To support their home purchase, PHA also provided families with down payment assistance through PhillySEEDS (40 families) and soft second mortgage assistance (23 families) in FY 2024.

PHA continued its partnership with Jumpstart Philly, rehabilitating vacant and distressed scattered site units. In support of equitable development efforts, PHA and Jumpstart Philly selected local aspiring developers to participate in the partnership program, where they received training, mentoring and financial resources to renovate the scattered site units. Once renovations are complete, the scattered site units are sold to low-income families. In FY 2024, renovations for the second and third cohorts commenced. As of FYE 2024, seven (7) of the units in these cohorts had been sold to eligible low-income families, four (4) were under agreement, six (6) were listed for sale, and 17 were under construction.

Through support and coaching of her ODAHP Homeownership Counselor, an HCV participant was able to fulfill her long-sought dream of becoming a homeowner. ODAHP connected her with resources to overcome hurdles to becoming a first-time homeowner, including first-time homebuyer grants and assistance through PhillySEEDS.

Approval and Implementation

- Approved FY 2019
- Implemented FY 2019

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

High interest rates continued to present a significant barrier to families seeking to become first-time homeowners through the ODAHP program.

Metrics:

<i>HC #6: Increase in Homeownership Opportunities</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households that purchased a home as a result of this activity (increase).	0	60	49	No
<i>* Includes HCV participant and PH residents who were able to purchase a home through one or more of the assistance programs under this activity.</i>				
<i>HC #5: Increase in Resident Mobility</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0	60	49	No
<i>* Includes HCV participant and PH residents who were able to purchase a home through one or more of the assistance programs under this activity.</i>				

ACTIVITY 2019-2: SHARSWOOD YOUTH & FAMILY ENRICHMENT SERVICES

Description/Impact/Update

PHA continued to utilize MTW funding flexibility to support after school, extracurricular, and enrichment programs designed to help improve educational outcomes and high school graduation rates for PHA youth and other low-income youth living in the Sharswood/Blumberg neighborhood of Philadelphia. This activity also provides partial funding for case management for youth and their families to help overcome barriers to educational success and to access community resources to address family supportive service needs.

As part of the comprehensive neighborhood transformation strategy for the former Blumberg public housing development and the surrounding Sharswood community, PHA provides \$500 per student per year in MTW funds to support after school, extracurricular, and enrichment programs as well as case management services for youth in grades 9-12 in coordination with a neighborhood school established in September 2017 serving youth in grades 9-12, which is operated by Big Picture Schools Philadelphia (BPSP) and located in the Vaux Community Building. BPSP works to engage students in learning and internship opportunities to encourage career exploration and progression to higher education.

The Vaux Community Building, a key part of the Choice Neighborhood Transformation Plan, serves as a focal point and anchor for the revitalized community, with on-site facilities for educational, health care and other supportive services. In FY 2019, PHA was designated by HUD as an EnVision Center. The plan to establish a neighborhood school and to improve educational outcomes is an integral component of the comprehensive Choice Neighborhoods Transformation Plan for Blumberg/Sharswood.

This MTW activity provides partial funding of BPSP's after school programs including homework assistance, sports activities, robotics, music production, computer refurbishing and other education-related activities. Partial funding is also provided for case management support to youth and their families through BPSP's Resilience Specialist. The Resilience Specialist provides one-on-one and group counseling to students and their families, with the goal of identifying and removing barriers to educational success and family stability.

PHA shares BPSP's goal of helping PHA and other low-income youth to exceed citywide educational metrics, and to graduate and move onto higher education and meaningful careers. While the primary beneficiaries of the services provided by BPSP are members of PHA resident households, including residents of public housing and the HCV program, other low-income neighborhood youth are also served.

In FY 2024, PHA continued to work towards its goal to improve educational outcomes as part of the Choice Neighborhoods Transformation Plan. PHA provided \$193,000 in MTW funds to support after school, enrichment, and extracurricular programming and provide case management to families to address supportive service needs.

The impact of PHA's support for BPHS is evidenced in the continued improvement and success of its students: BPHS graduated 100% of the class of 2023 the result of steady increases in the graduation rate year-over-year. Over 70% of this graduating class planned to continue their education after graduation including 18 students who were accepted and planned to enroll in four-

year colleges, 14 students planned to enroll at CCP, and 11 students enrolled in industry-focused higher education programs. Prior to graduation, the class of 2023 benefitted from unique programs and services available to them at BPHS, with over 90% of the class participating in an internship program and five (5) students earning college credits during their senior year.

Approval and Implementation

- Approved FY 2019
- Implemented FY 2019

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA met all benchmarks set for this activity.

Metrics:

<i>SS #5: Households Assisted by Services that Increase Self-Sufficiency</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	0	320	386	Yes

** After-school programming and case management services are made available to both PHA residents and youth from the surrounding Sharswood/Blumberg neighborhood, including 134 school-aged PHA residents.*

ACTIVITY 2020-1: LOCAL FAMILY SELF-SUFFICIENCY PROGRAM FLEXIBILITY

Description/Impact/Update

PHA continued to implement a local Family Self-Sufficiency (FSS) model. In FY 2024, PHA received approval for a revised FSS program model, the PHA Advantage FSS Program, which incorporates important changes to how participating families earn escrow. These changes are intended to encourage broader participation in FSS and incentivize educational goals and greater engagement in case management. This revised model includes the following program components:

- *Revised Escrow Model* - In order to encourage families of all income levels to participate in the FSS program, PHA has established an escrow model in which the monthly escrow amount is determined by the family's annual earned income, rather than the change in their Total Tenant Payment (TTP). As shown in the table below, the family will receive escrow according to income tiers; the family must earn at least \$3,500 in order to begin saving.

Annual Earned Income		Monthly Escrow Amount
\$0	\$3,499	\$0
\$3,500	\$6,499	\$50
\$6,500	\$9,499	\$75
\$9,500	\$12,499	\$100
\$12,500	\$15,499	\$125
\$15,500	\$18,499	\$150
\$18,500	\$21,499	\$175
\$21,500	\$24,499	\$200
\$24,500	\$27,499	\$225
\$27,500	\$30,499	\$250
\$30,500	\$33,499	\$275
\$33,500	\$36,499	\$300
\$36,500	\$39,499	\$325
\$39,500	\$42,499	\$350
\$42,500	\$45,499	\$375
\$45,500	\$48,499	\$400
\$48,500	\$51,499	\$425
\$51,500	\$54,499	\$450
\$54,500	\$57,499	\$475
\$57,500	\$60,499	\$500
\$60,500	\$63,499	\$525
\$63,500	\$66,499	\$550
\$66,500	\$69,499	\$575
\$69,500	\$72,499	\$600
\$72,500	\$75,499	\$625
\$75,500	\$78,499	\$650

Annual Earned Income		Monthly Escrow Amount
\$78,500	and up	\$675

If the family's earned income decreases below \$3,500 during their participation, they will no longer receive escrow. However, if the family's earned income later increases and meets or exceeds \$3,500, they will again receive escrow.

PHA may make modifications to factors in the revised escrow model such as earned income bands and escrow amount in future fiscal years in order to meet FSS program objectives.

- *Incentives* - PHA provides incentives for participants who meet interim goals in order to encourage continued participation in the FSS program and commitment to ITSP goals. Incentives payments will be made with the final escrow disbursement; however interim incentives may be paid at the time the goal is achieved if and when the family provides justification of the need for the disbursement to support one of their FSS goals.
 - \$150 for completion of a GED or receipt of a high school diploma
 - \$150 for completion of a job training or skills development program, approved by PHA or their designated FSS contractor
 - \$250 for obtaining the skilled trade or job-specific certification, such as required for pharmacy assistants or construction trades and approved by PHA or their designated FSS contractor
 - \$250 for an Associates Degrees (one-time limit per person)
 - \$500 for completion of a bachelor's or master's degree (one-time limit per person).

In addition to the interim incentives listed above, PHA provides an incentive of up to \$2,000 to recent program graduates who purchase a home within two (2) years of completing the PHA Advantage FSS program. To qualify for this homeownership incentive, the graduate must complete a homeownership course and/or counseling approved by PHA. This incentive may be used for down payment and/or post-purchase expenses; PHA will provide this incentive to qualifying graduates in addition to their final escrow disbursement. Accordingly, PHA will not count the homeownership incentive against the cap on total escrow.

PHA also provides an incentive payment of \$5,000 for FSS graduates that choose to terminate their assistance in the Public Housing or HCV program within two (2) years of completing the FSS Program.

PHA will use FSS escrow forfeitures to fund the incentives described above, including interim incentives for current FSS participants as well as self-sufficiency and homeownership incentives for FSS graduates. PHA will continue to comply with the regulatory requirements for monthly reporting of FSS escrow forfeitures on Form HUD-52681-B.

- *Contract Term* - Using its MTW flexibility, PHA will initiate the five-year term at the execution (effective date) of the CoP. The change in contract term is necessary to conform with other proposed changes which will allow participants to escrow upon execution of their CoP, rather than after their first recertification of income.

In FY 2024, 553 participated in PHA's local FSS program. Two current participants' stories highlight the success of the local FSS program. With support from the FSS program, one participant was able to achieve their savings and homeownership goals. Through coaching sessions, the participant secured a promotion at work, reduced their debt, and significantly increased their savings. This financial stability allowed the participant to lay the groundwork for their long-term goal of homeownership. FSS staff connected them with support through PHA's Opening Doors to Affordable Homeownership (ODAHP) program and various local grant programs, supports which allowed them to purchase their first home in late 2023.

Another participant was able to overcome hurdles, achieve financial stability and become a homeowner. The sole caregiver for her grandchild, this participant faced challenges to financial stability, including enduring a car accident and income loss during the COVID-19 pandemic. Through support from the FSS program, she was able to improve her credit score, working with her coach to build her credit and successfully dispute erroneous accounts negatively impacting her score. She secured a better paying job at Penn Medicine, allowing her to start saving through her FSS escrow account. She was also connected with support through PHA's ODAHP program and purchased a home in the fall of 2023.

Approval and Implementation

- Approved FY 2020
- Implemented FY 2020
- Modified FY 2024

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the baseline or benchmarks listed in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmark for job training but exceeded benchmarks for employment rate and average earned income.

Metrics:

<i>SS #1: Increase in Household Income*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	HCV: \$21,099 PH: \$27,049	HCV: \$23,499 PH: \$29,449	HCV: \$33,995 PH: \$35,159	Yes
<i>SS #2: Increase in Household Savings*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of savings/escrow of households affected by this policy	\$0	\$990	HCV: \$5,585 PH: \$4,831	Yes
<i>SS #3: Increase in Positive Outcomes in Employment Status</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Unemployed	108 (72%)	310 (62%)	215(41%)	Yes
Employed	42 (28%)	190 (38%)	306 (59%)	Yes
Enrolled in Education**	0	30 (6%)	37 (7%)	Yes
Enrolled in Job Training**	0	65 (13%)	36 (7%)	No
<p><i>* FSS participants who graduated and exited the HCV or Public Housing programs during the fiscal year have been excluded from these metrics.</i></p> <p><i>** FSS participants who completed goals related to education or job training/ employment growth during the fiscal year.</i></p>				
<i>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease)	17 (11.6%)	58 (11.6%)	37 (7%)	Yes
<i>SS #5: Households Assisted by Services that Increase Self-Sufficiency</i>				
Unit of Measurement	Baseline	Benchmark	Outcome*	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency	0	500	553	Yes
<i>*Includes FSS families who graduated during the fiscal year but who have not yet exited the HCV or Public Housing programs.</i>				
<i>SS #8: Households Transitioned to Self-Sufficiency</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase).	0	0	67	Yes

ACTIVITY 2020-2: SPONSOR-BASED SHARED HOUSING PILOT

Description/Impact/Update

Under this activity, PHA continued to implement a pilot program to expand housing options for homeless individuals and other hard to serve special populations, which builds on and enhances the ongoing collaboration between the City and PHA to reduce homelessness through the “Blueprint to End Homelessness” initiative.

The pilot program initially involved a shared housing model which included twenty-five (25) units in partnership with the City. PHA subsequently expanded the pilot program with the City to include an additional ten (10) units and entered into a new partnership with the Community College of Philadelphia (CCP) to serve up to sixteen (16) at-risk, low-income students, providing housing opportunities in scattered site units located within walking distance of CCP. Based on an evaluation of the program’s effectiveness in reducing homelessness and providing stable housing for participants, PHA may elect to further expand the program and the number of units. The elements of the pilot program include:

- Using grant funding provided by the City to leverage MTW funds, PHA will rehabilitate existing vacant and uninhabitable scattered site public housing units. Units will generally be large-bedroom sizes with 3+ bedrooms per unit. No liens will be placed on the properties.
- PHA will enter into a master lease for one or more of the rehabilitated units with the City and/or qualified local, non-profit provider(s) that serves formerly homeless individuals and/or other hard to serve populations, i.e. youth aging out of foster care, chronically homeless, victims of domestic violence, etc.
- PHA does not intend to mix different target populations within the same unit. Supportive services will be offered directly and/or through referrals based on the needs and priorities of the resident population served, which may include case management, behavioral health services, preventive health care, adult education, employment and training, and/or other services.
- Under the terms of the master lease, the City and/or designated provider(s) (“Sponsor Agency”) will pay a flat rent to PHA. PHA will not collect or receive rents from individual tenants. The Sponsor Agency(s) will be allowed to sublease individual rooms within the unit to eligible, low-income individuals. The Sponsor Agency(s) will provide a shared housing model and supportive services to program participants and will: screen and determine eligibility of participants; maintain a waiting list if needed; implement a rent policy by which participants will pay no more than 30% of income for rent; enter into sublease agreements with participants; collect rents; and, develop and enforce house rules. PHA does not anticipate that on-site staffing will be required.
- Participants in this pilot program will not be considered public housing residents, and will not have the responsibilities and rights associated with PHA public housing resident households. PHA will request HUD approval to classify the units covered under master

lease as “MTW Neighborhood Services” units in accordance with PIH 2011-7. PHA will then report on households served through the MTW 50058 form. PHA’s understanding is that each occupied unit will count as one household for MTW purposes, irrespective of the number of individuals sharing the unit.

- Participants will not be subject to PHA’s Admissions and Continued Occupancy Policies including, but not limited to, those related to Eligibility Determination, Continued Occupancy, Transfers, Informal Hearings or Grievance Hearings. However, participants will be subject to admissions and continued occupancy policies established by the City or qualified, local non-provider with whom PHA has entered into a master lease.
- Participants will not enter into lease agreements with PHA and will not pay rent to PHA. They will not be subject to public housing Community Service requirements.
- Lease enforcement (up to and including evictions), house rules enforcement, rent collection and other property management activities will be the responsibility of the City or qualified local, non-profit provider with whom PHA has entered into a master lease.
- PHA will ensure that all units meet UPCS standards at initial inspection. PHA’s role will be to prepare the unit for initial occupancy and perform routine and emergency maintenance services.
- The City and/or Sponsor Agency(s) will provide PHA with quarterly reports that provide basic data on program participants including household income, dates of occupancy, supportive services provided, outcomes achieved and other required information.

In FY 2024, 39 units were occupied under the pilot program with the City of Philadelphia, serving 60 participants. Under the pilot program with the Community College of Philadelphia, PHA served nine (9) CCP students, providing housing in six (6) units.

Approval and Implementation

- Approved FY 2020
- Implemented FY 2020

Hardship

Not applicable.

Actual Non-Significant Changes

In FY 2024, PHA increased the number of units included in the program to 41, including 35 units with the City and six (6) units with CCP.

To support the stability and success of students assisted in partnership with CCP, PHA has entered an agreement with the Drueding Center, a local non-profit with experience supporting families who are homeless or at-risk of homelessness, to provide case management and other services to CCP students residing in the partnership units.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet the benchmark set for HC #1. While it is PHA's role to make units available for the purposes of the shared housing program, the sponsor agency is responsible for identifying eligible individuals for occupancy, including screening and determining their eligibility and maintaining a waiting list when needed.

Metrics:

<i>HC #1: Additional Units of Housing Made Available</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).	0	41	39	No
<i>HC #7: Households Assisted by Services that Increase Housing Choice*</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0	41	60	Yes
<i>* Number of participants assisted through this activity.</i>				

ACTIVITY 2021-1: LIMITED PILOT - MTW CONTINUED OCCUPANCY POLICY

Description/Impact/Update

In FY 2021, PHA received HUD approval to implement a pilot program to require work-able adults residing in select PHA developments to work or participate in an education or job training program. Recognizing the health and financial impact of the COVID-19 pandemic on low-income families, PHA paused plans to implement the pilot program. In FY 2024, PHA completed planning and began implementation of this pilot program, with ample services and hardship protections to ensure that families have the capacity and support to comply with the new requirements.

To support and provide incentives for employment and self-sufficiency, PHA has implemented a pilot program that will establish an MTW continued occupancy policy applicable to new residents at a limited number of target developments and units. The pilot program policy requires all non-disabled adults age 18-54 in the household to complete at least 20 hours per week of employment – or participation in an approved education or job training program - as a condition of continued occupancy. Elderly and disabled adults, household members who become elderly or disabled and household members who are caretakers of elderly/disabled family members will be exempt from the continued occupancy requirement. To support residents in achieving compliance, households are referred, and provided with supportive services as needed, to PHA's Workforce Center, where they will be able to work with a PHA Navigator to identify and secure employment, training and supportive service placements and referrals and/or to a PHA partner agency.

The pilot program policies apply only to households that are *newly admitted or transferred* after implementation of this MTW activity to: 1) Public Housing scattered site units; 2) PHA owned or controlled non-RAD PBV developments; and 3) Turnover units, and units available at initial occupancy for which there are no public housing conversion households with a right to return, in PHA-owned or controlled PBV RAD developments. Households who have a right to return to a RAD development will continue to be offered units before any new admission and will not be subject to the continued occupancy work requirement.

In tandem with the pilot program, PHA has established an admissions and transfer preference applicable only to the above-listed target units and development. The admissions and transfer preference, which does not require MTW waivers from HUD, will be assigned to eligible applicant households where at least one adult is working 20+ hour per week. Eligible elderly (55+) and disabled applicants will also be assigned this preference.

A household member who has a short-term medical issue or disability, or who is responsible for the care of a child under age six and is unable to secure appropriate childcare, which prevents the member from fulfilling the work (or education or job training program) requirement will be allowed to request a temporary hardship exemption subject to third party verification of the hardship.

In FY 2024, PHA updated the waiting list for Public Housing to provide the admissions preference to families that qualified and began implementation of the MTW continued occupancy policy at the select units and developments noted above.

Approval and Implementation

- Approved FY 2021
- Implemented FY 2024

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not meet benchmarks related to employment and education, as this continued occupancy policy was implemented during the fiscal year and impacted only a limited number of applicants housed from the waiting list. PHA anticipates that the employment and education rates will continue to increase in future fiscal years as more families are subject to the policy.

Metrics

<i>SS #1: Increase in Household Income</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	\$27,399 (HCV) \$30,953 (PH)	\$28,769 (HCV) \$32,501 (PH)	\$29,576 (HCV) \$35,277 (PH)	Yes
<i>SS #3: Increase in Positive Outcomes in Employment Status</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Increase in Positive Outcomes in Employment Status – Employed (increase).	48% (HCV) 48% (PH)	50%	32%	No
Increase in Positive Outcomes in Employment Status – Unemployed (decrease).	52% (HCV) 52% (PH)	50%	68%	No
Enrolled in Education*	8%	9%	5%	No
* Number of households with a full-time student.				

ACTIVITY 2022-1: EMERGENCY WAIVERS

Description/Impact/Update

PHA uses MTW flexibility to establish emergency waivers during economic and health related emergencies and natural disasters as declared by the Mayor or his/her designee. This activity allows PHA to waive and/or adopt alternative requirements should they be needed in order to relieve burdens on all stakeholders, including low-income families participating in PHA's Public Housing and HCV programs.

- **Delayed Reexaminations:** PHA may waive the requirement to conduct a reexamination of family income and composition at least annually. Currently PHA completes reexaminations on a biennial basis for Public Housing (PH) and Housing Choice Voucher (HCV) program households and on a triennial basis for PH households on ceiling rents and PH and HCV elderly/disabled households on fixed incomes. Where reexaminations have been delayed, PHA will complete the reexamination no later than the anniversary month of the following year. The next reexamination will be scheduled on the same anniversary month using the applicable reexam frequency for the family. For example, if a biennial reexam was due on July 2020, PHA would complete the reexam by July 2021. The next scheduled biennial reexam would take place in July 2023. This waiver applies to the PH and HCV programs.
- **Verification of Income:** PHA may waive the requirements of the verification hierarchy and continue to use Enterprise Income Verification (EIV) to confirm tenant income at both interim and regular recertifications, unless specifically waived by HUD. This waiver applies to the PH and HCV programs.
- **Increase in Payment Standard:** PHA may waive the requirement to apply the increased payment standard back to the regular effective date for delayed regular reexaminations. Instead, during periods of declared emergencies, PHA will apply the increased payment standard at the next interim reexamination after the effective date of the increased payment standard. If PHA completes a reexam late, PHA will apply the payment standard in effect on the effective date of the delayed regular reexamination. This waiver applies to the HCV program.
- **Delayed Regular HQS Inspections:** PHA may waive the requirement for completion of regular HQS inspections at least biennially. Where a regular HQS inspection has been delayed, PHA will complete the HQS inspection no later than the anniversary month of the following year. The next HQS inspection will be scheduled on the same anniversary month using the applicable inspection frequency for the unit. For example, if an HQS inspection was due on July 2020, PHA would complete the inspection by July 2021. The next scheduled annual HQS inspection would take place in July 2022. PHA will continue to request a self-certification from the owner that no life threatening conditions exist in the unit. Additionally, PHA will continue to conduct complaint inspections. This waiver applies to the HCV program.

- **Interim HQS Inspections:** PHA may waive the requirement to conduct re-inspections to confirm repair; however, PHA will require that the owner self-certify and provide documentation that a life-threatening deficiency has been corrected within 24 hours of notification and that a non-life-threatening deficiency has been corrected within 30 days of PHA notification. This waiver applies to the HCV program.
- **HQS QC Inspections:** PHA may waive the requirement to conduct HQS quality control inspections and instead will suspend HQS quality control inspections until the emergency waiver has been lifted. This waiver applies to the HCV program.
- **Homeownership HQS:** PHA may waive the requirement for the initial HQS inspection for homeownership units; however, an independent professional inspection will still be required. This waiver applies to the HCV Homeownership Program.
- **Delayed PH Annual Self-Inspection:** PHA may waive the requirement to complete annual self-inspections of PH units. PHA will continue to respond to and address serious conditions that could jeopardize life or property. When the waiver is lifted, PHA will resume self-inspections beginning with the units which were inspected on the oldest date. This waiver applies to the PH program.
- **FSS Contract of Participation:** PHA may waive the requirement regarding the maximum extension of an FSS Contract of Participation (COP). During periods of declared emergency, PHA may extend a family's COP, using the declared emergency as good cause of the need for extension. For households who were already in the two year extension period when the emergency was declared, PHA may extend their COP beyond the two year extension threshold. This waiver applies to the PH and HCV FSS program.

As the local and national states of emergency for the COVID-19 pandemic have expired, PHA did not avail itself of the waivers and alternate requirements made available under this activity in FY 2024. PHA reserves the right to use these flexibilities in the event of future economic or health related emergencies and natural disasters.

Approval and Implementation

- Approved FY 2022
- Implemented FY 2022

Hardship

Not applicable.

Actual Non-Significant Changes

There were no non-significant changes to this activity in FY 2024.

Actual Significant Changes

There were no significant changes to this activity in FY 2024.

Changes to Metrics

No changes were made to the metrics in the FY 2024 Annual Plan.

Challenges in Achieving Benchmarks & Possible Strategies

PHA did not use the waiver and alternative requirements for delayed reexaminations under this activity.

Metrics

<i>CE #2: Staff Time Savings</i>				
Unit of Measurement	Baseline*	Benchmark*	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	22,761 Hours	11,381 hours	N/A	N/A

***The baseline reflects the time expended on all PH and HCV regular reexaminations for a one year period. The benchmark reflects the time expended for one half the number of PH and HCV regular reexaminations in a one year period.*

B. Activities Not Yet Implemented

ACTIVITY 2014-1: FLEXIBLE SUBSIDY INITIATIVE

Description/Update

The Flexible Subsidy Initiative provides PHA with the flexibility, subject to HUD approval, to establish operating subsidy levels for newly constructed public housing units, which blend MTW funds (HAP and Operating Fund). This activity was approved by HUD in FY 2014. PHA has not utilized this flexibility to date; however, it may be utilized, subject to HUD approval, in future transactions.

C. Activities on Hold

Not applicable.

D. Closed Out Activities

The following table summarizes previously approved MTW activities that PHA has completed, discontinued, or determined that the activity no longer requires MTW authority to implement.

Table 20: Closed Out MTW Activities

Activity	Plan Year	Close Out Year	Reason for Close Out
Assisted Living	FY 2009	FY 2011	PHA discontinued this activity prior to its implementation based on a determination that sufficient funding was not available from state, federal and other required sources.
Home Care Services	FY 2009	FY 2011	PHA discontinued this activity prior to its implementation based on a determination that services can be delivered more efficiently through third-party partners.
Scattered Site Income Tiering	FY 2011	FY 2011	PHA discontinued this activity prior to its implementation based on decisions made as part of the scattered site asset repositioning initiative including disposition and auction of vacant and obsolete properties.
HCV Time Limit	FY 2004	FY 2012	PHA discontinued this activity due to economic conditions, which limited the availability of jobs for residents.
HCV HQS Enforcement	FY 2004	FY 2012	PHA discontinued this policy based on a decision to establish uniform HQS enforcement policies for both MTW and Non-MTW vouchers.
Public Housing Service Order Policy	FY 2004	FY 2012	PHA discontinued this policy after discussions with the HUD Field Office concerning the need to expedite service order response times.
Tenant Responsibility Training	FY 2004	FY 2013	PHA determined that this activity does not require MTW flexibility to implement.
Blueprint	FY 2004	FY 2013	PHA continues to implement the Blueprint Program; however, a determination was made that the activity does not require MTW flexibility.
Transitional Housing Facilities	FY 2007	FY 2013	PHA determined that comparable activities are authorized under Partnership Initiative.
LIFE Program	FY 2007	FY 2013	PHA determined that this activity does not require MTW programmatic waivers or funding.
Community Service Policy	FY 2011	FY 2013	PHA determined that this activity does not require MTW flexibility.
Expanding Use of LIHTC	FY 2011	FY 2013	PHA determined that the proposed activities were covered under Partnership and Unit-Based Leasing/Development Initiatives.
Family Economic Development Action Plan/Tenant Responsibility Training	FY 2004	FY 2014	PHA discontinued this activity along with discontinuation of HCV time limits, as they were interrelated activities. No additional statutory exceptions outside of the current MTW flexibilities were considered.
Comprehensive Resident Self Sufficiency Services	FY 2005	FY 2014	PHA continues to provide comprehensive resident self-sufficiency services utilizing MTW funds. However, MTW programmatic waivers are not

Activity	Plan Year	Close Out Year	Reason for Close Out
			required. These activities are now referenced in Chapter V under the Single Fund Flexibility section.
90 Day Voucher Reissuance Policy	FY 2005	FY 2014	PHA discontinued this policy based on an assessment that it would not contribute to PHA's utilization goals.
Accessible Unit Retrofitting and Development	FY 2010	FY 2014	PHA has completed the accessible unit retrofitting under Attachment E of the MTW Agreement. PHA will continue to develop accessible units as part of its revitalization programs; however, this activity does not require specific MTW waivers
Moving to Work Family Agreement Addendum	FY 2004	FY 2016	PHA elected not to utilize this Agreement and instead provides a Family Responsibilities form to each household at each regular recertification.
\$20 Minimum Threshold for Utility Allowance Reimbursements	FY 2009	FY 2016	PHA elected not to establish a minimum threshold of \$20 for payment of utility allowance payments.
Adult Day Care	FY 2011	FY 2017	PHA transitioned the program to a qualified third party provider, and does not provide MTW funding or utilize MTW waivers to support the activity.

V. SOURCES AND USES OF MTW FUNDS

A. Actual Sources and Uses of MTW Funds

i. Actual Sources of MTW Funds

As required, PHA submits unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the HUD Financial Assessment System. For informational purposes, the FDS for FY 2024 are shown below.

FDS Line Item	FDS Line-Item Name	Actual
70500 (70300+70400)	Total Tenant Revenue	\$32,588,333
70600	HUD PHA Operating Grants	\$464,602,848
70610	Capital Grants	\$66,741,830
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	0
71100+72000	Interest Income	\$9,133,509
71600	Gain or Loss on Sale of Capital Assets	(\$30,812,545)
71200+71300+71310+71400+71500	Other Income	\$15,863,655
70000	Total Revenue	\$557,117,650

ii. Actual Uses of MTW Funds

FDS Line Item	FDS Line-Item Name	Actual
91000(91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating – Administrative	\$70,733,539
91300+91310+92000	Management Fee Expense	\$0
91810	Allocated Overhead	\$0
92500(92100+92200+92300+92400)	Total Tenant Services	\$6,315,745
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$20,431,784
93500+93700	Labor	\$2,542
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$75,987,229
95000 (95100+95200+95300+95500)	Total Protective Services	\$8,190,285
96100 (96110+96120+96130+96140)	Total Insurance Premiums	\$13,945,077
96000(96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$23,111,246

FDS Line Item	FDS Line-Item Name	Actual
96700 (96710+96720+96730)	Total Interest Expense and Amortization Cost	\$1,219,842
97100+97200	Total Extraordinary Maintenance	\$11,710,846
97300+97350	HAP + HAP Portability-In	\$184,518,817
97400	Depreciation Expense	\$35,216,360
97500+97600+97700+97800	All Other Expense	\$101,747.395
90000	Total Expenses	\$553,193,707
Sources greater than (less than) Uses		\$3,923,943

PHA plans to utilize existing reserves to fund capital investment, affordable housing development programs and other authorized MTW activities noted in the MTW Annual Plan.

iii. Describe Actual Use of Single Fund Flexibility

Sources of Funds:

In FY 2024, the majority of PHA's funding came from HUD in the form of Housing Choice Voucher, Public Housing Operating Subsidy, and Capital Fund grants totaling \$531.4 million. PHA also received \$32.6 million in tenant revenues.

Uses of Funds:

- PHA continued to increase affordable housing opportunities for low-income families, providing approximately \$184.6 million in housing assistance payments (HAP) for the tenant based and project-based programs under the HCV program. PHA also provided \$20.6 million for operating costs associated with mixed finance communities.
- PHA expended \$75.3 million in Administrative Expenses, which includes administrative salaries, employee benefits, and office expenses. Additionally, this expense includes MTW initiated Tenant Services - Family Programs, and management efficiencies. See Table 21 below for a summary of resident services initiatives in FY 2024 including MTW and Non-MTW funded initiatives.
- Maintenance Expenses for PHA's developments and scattered sites totaled \$76.0 million, and includes labor and materials, contracts for Heating and Cooling, and other contracts to ensure routine and emergency issues are addressed timely.
- PHA invested \$8.2 million in Protective Services to promote continued quality of life for residents. This expense includes labor, materials, and employee benefits.

Also, during this period, PHA undertook other noteworthy activities including:

- Rehabilitation of more than 25 scattered sites units through in-house modernization totaling approximately \$9.9 million. Capital improvements of \$25.1 million to various Conventional and Scattered sites including 504 modifications, roofing, plumbing upgrades and other site improvements and upgrades.
- Undertook new development projects including new ACC and RAD transactions comprising of Sharswood 6A LP, Sharswood Phase 4A LP, Beyond Foster Care on Ridge, Harlan Street, Harrison Senior Tower LP, Hunt Sharswood Phase III, Fairhill Phases I, II, & III, Westpark Apartments Phase 2, Hartranft Community Center, and others. To date, PHA has invested more than \$53.0 million on these projects

Table 21: Resident Services Program Summary for FY 2024

Program or Partner	Program Description	Target Population	Funding Source	Residents Served
Adult Education, Training & Employment				
PHA Workforce Center	Drop-in center: Employment “one-stop” providing connections to jobs and training opportunities	PHA residents and Sharswood families	MTW	350+ Families Served
PHA Workforce Center Job Training Enrollments	Occupational skills training (CDL, CNA, IT, etc.) in career areas with reasonable growth potential and connection to employment	PHA residents 18-55	MTW	Approximately 100 people enrolled with 50% overall completion rate.
Temple-Lenfest North Philadelphia Workforce Initiative – Training Programs	Intro to Barbering Pre-Apprenticeship Phlebotomy Tech training	PHA residents + community residents	Temple University via Lenfest Foundation sub-grant	Barbering: 15/16 completed Phlebotomy: 23/29 completed Overall: approximately 85% completion rate
Section 3 Job Bank	Ensure that economic opportunities are provided to PHA residents through workshops, info sessions and job matches	PHA residents 18-55	Section 3 vendors	155 positions in the job bank (102 from PHA contractors)
Section 3 Resource Center	Ensure that economic opportunities are provided to PHA residents through workshops, info sessions and job matches	PHA residents 18-55	MTW, Section 3 vendors	100+ resident participants in workshops and screening
Section 3 Entrepreneurial Fellows	Six-month fellowship designed to provide a deeper dive into residents’ journey to self-sufficiency. Fellows are given hands-on support and start-up funds.	PHA residents 18-55	MTW	40+ resident entrepreneurs have already completed the program, including 14 Cohort 5 fellows completing the program in FY 2024.

Program or Partner	Program Description	Target Population	Funding Source	Residents Served
PHA Community Health Worker Program	Temple University-trained CHWs providing health navigation and information, access to resources and wellness support	All PHA residents	MTW	18 Community Health Workers connected with 2,417 unique PHA residents through wellness check-in calls and in-person visits.
Financial Management				
Financial Literacy (Homeownership Track)	Course on credit and money management to enable residents to purchase homes	PHA residents 18-55	MTW	750+
FSS (w/ Compass Working Capital)	Assessment of individual and financial needs, enrollment in FSS, followed by referrals and tracking	PHA residents 18-55	HUD grant	550+ enrolled (eff. end FY24) FY24 graduates: 96
Homeownership Program	Housing counseling and assistance with home purchase process; includes 5H, HCV and Mobility Homeownership.	PHA residents 18-55	MTW, Other	1,000+ workshop attendance 500+ actively participating in some PHA homeownership activity 49 sales
HUD-Supported Place-Based Initiatives				
CNI Sharswood: People Pillar	Located within the Vaux Community Building, CNI Sharswood People Pillar staff provide place-based case management and service coordination for individuals and families living in and/or moving to the Sharswood neighborhood.	<p>Ongoing comprehensive case management for Sharswood PHA residents returning to Blumberg replacement units and other Sharswood households moving into units built as part of the CNI Housing Strategy.</p> <p>Service coordination for non-PHA Sharswood households and residents from relocated households who decide not to return to Blumberg replacement units.</p>	HUD grant	CNI Sharswood-Blumberg Case Managers connected with 256 target households

Program or Partner	Program Description	Target Population	Funding Source	Residents Served
CNI Bartram: People Pillar	CNI Bartram People Pillar staff provide place-based case management and service coordination for all 890+ individuals/425 families living at Bartram Village as of CNI award date	Ongoing comprehensive case management for Bartram residents as PHA prepares to launch CNI Bartram Housing Strategy	HUD grant	215 target area families received Choice services and supports from PHA Resident Programs & Partnerships and Operations staff
CNI Norris: Endowment Phase	Place-based case management for families relocated from or living in the Norris North Central development	Entire family	HUD grant	200+ assessments completed; Supportive Services Endowment phase winding down.
Jobs Plus Program	Place-based employment program designed to increase the earnings and employment of working-age residents	PHA residents 18-64 at Wilson Park Apartments	HUD grant	276 participants, with 201 families/households enrolled in Jobs Plus Earned Income Disregard
ROSS	Assessment of individual and family needs, followed by referrals and tracking	All PHA residents at targeted conventional sites, focus on 18-55	HUD grant	Service coordination for approximately 250 residents between 9 PHA sites in West, North and Northeast Philadelphia
Youth & Family Programs				
Diversionary Program	Programming designed to address violence in communities and partner with organizations equipped to address trauma.	Entire family	MTW	Closed 354 of 446 total cases, including 111 referrals from PHA Office of Public Safety – still supporting 92 individuals as of FY end
Social Service Program	Providing intervention services and resources to support mental & behavioral health concerns while promoting independence.	Entire family	MTW, other blended funds	245 individuals and families served
PHA Youth & Family Center	One-stop drop-in center for expecting parents and PHA families raising young people 0-18+, including grandparents raising grandchildren	Youth age 0-18 and parents or caregivers	MTW, William Penn Foundation grant	500+ participants (total includes some also counted below)
Afterschool Programs	On-site programs which meet the standard of providing: (1) homework assistance, (2) project-based learning, (3) community service, and	Youth age 6-18	MTW, HUD CNI Grant	150+ PHA youth

Program or Partner	Program Description	Target Population	Funding Source	Residents Served
	(4) physical/body kinesthetic activities			
PHA Summer Camps	Summer enrichment activities to prevent academic regression	Youth age 6-13	MTW	100+ PHA youth
Big Picture Philadelphia	Project-based public high school in the CNI Sharswood footprint	Students in grades 9-12	MTW	134 PHA students out of the total student body of 386
Mighty Writers Out-of-School Programs	Provides literacy programming and activities.	Youth age 3-18	Partnership, William Penn Foundation, HUD CNI Grant	96 PHA residents + over 100 non-PHA community residents enrolled; 80-200/week participating in food and diaper distribution
Youth Summer Jobs Program (“Summer WorkReady”)	Six weeks of summer employment for youth placed at PHA sites	Teens	Philadelphia Youth Network WorkReady, non-profit partners	25 students placed at PHA, over 50 youth served
ParentChild+ Program	School readiness program provided to support families’ successful enrollment in high quality Pre-K.	Low-income Sharswood families with children between the ages of 16 months to 4 years of age, prioritizing CNI target families	HUD CNI grant	13 of 15 enrolled families completed full program (87% completion rate)
Meal Programs				
Summer Food Programs	Breakfast and lunch served on-site to provide appropriate nutrition to youth and young adults during the summer	Youth age 5-18	MTW, Pennsylvania Department of Education	40,000 meals served
Senior Meals Programs	Meal programs, which not only enable residents to have appropriate nutrition, but also best practice fellowship to support aging in place	PHA residents 62+	HUD grant	16,000 meals served at Bentley Hall 18,000 meals served at senior sites through Philadelphia Corporation of Aging (PCA)

B. Local Asset Management Plan

Local Asset Management Plan

i. *Did the MTW PHA allocate costs within statute in the Plan Year?*

No

ii. *Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?*

Yes

iii. *Did the MTW PHA provide a LAMP in the appendix?*

Yes

iv. *If the MTW PHA has provided a LAMP in the appendix, provide a brief update on implementation of the LAMP. Please provide any actual changes, or state that the MTW PHA did not make any changes in the Plan Year.*

No changes made in the Plan Year.

VI. ADMINISTRATIVE

A. Reviews, Audits, and Inspections

Table 22 below includes general descriptions and statuses of HUD reviews, audits and/or physical inspection issues for which PHA was required to take action to address deficiencies and/or recommendations in FY 2024.

Table 22: Status of HUD Reviews, Audits & Inspections

Review	Summary Description	Status
HUD Follow Up Maintenance Monitoring Review	HUD Maintenance Monitoring Review report was submitted to PHA in April 2016. PHA submitted responses and corresponded with HUD in 2016. HUD closed out three of eight required actions in December 2016. The HUD Field Office has indicated that PHA's response to the remaining five required actions are acceptable. Before formally closing out the review, HUD will review PHA's implementation of these actions during the next Maintenance Review.	Open
HUD OIG Audit of HUD Oversight of Lead Based Paint in Public Housing and HCV	HUD OIG is conducting an audit of HUD's oversight of lead-based paint in public housing and HCV housing. In 2017, PHA provided survey and case information requested by the OIG in various submissions. PHA received follow up correspondence from HUD in June 2019 and submitted a response in July 2019.	Open
HUD OIG Audit of Authority's oversight of Lead Based paint in the Public Housing Program.	HUD OIG selected PHA for an audit of the Authority's management of lead-based paint and lead-based paint hazards in its public housing program. An entrance conference was held and audit commenced on November 17, 2021. PHA received a final report from HUD OIG on August 8, 2023. PHA will submit to HUD the final standard operating procedures and training documentation in early FY 2025.	Open
HUD Office of Public and Indian Housing, Office of Housing Voucher Programs EHV Vendor Support Team (EVST)	HUD's Office of Housing Voucher Programs EHV Vendor Support Team (EVST) selected PHA to participate in a review of its Emergency Housing Voucher (EHV) program. The review, which was completed remotely, commenced on February 27, 2023 and included EHV activity beginning on July 1, 2021 through January 31, 2023. PHA has provided responses to requests for documentation from HUD for this review. HUD submitted a letter to PHA on November 14, 2023 indicating there were no findings and closing the review.	Closed
HUD Office of the Chief Financial Officer Payment Integrity Testing	HUD Office of the Chief Financial Officer selected PHA for Payment Integrity Testing to review PHA's disbursements to landlords from October 1, 2021 to September 30, 2022. HUD submitted a request for documents on April 7, 2023; PHA has responded and submitted all requested documents.	Open
HUD OIG Rental Assistance and Safe and Affordable Housing Division	HUD OIG selected PHA for an assessment of occupancy in Public Housing. HUD submitted a request for documents on September 8, 2023 and PHA provided all requested items. HUD conducted an on-site visit from October 23 to October 27, 2023 for the purposes of this assessment and held follow-up meetings with PHA to discuss open questions.	Open

PHA has instituted a policy whereby 100% of all deficiencies noted during REAC inspections, routine or otherwise, are tracked by way of creating a service order in the Customer Relationship Management system. Once created, these service orders can then be accessed and updated until

work is complete. Addressing actual maintenance, the entire agency has placed a stronger emphasis on the creation of service orders to immediately address deficiencies, both inside and outside of units, found during annual or informal inspections and site visits. PHA believes that these measures will continue to have a positive impact on future REAC scores.

B. Evaluations

Not applicable. PHA utilizes internal resources to measure and evaluate MTW Activities.

C. Certification of MTW Statutory Requirements

PHA certifies that, in Fiscal Year 2024, it continued to meet the three statutory objectives of the MTW program. The Board resolution containing the certification required by HUD is included as an Appendix.

VII. APPENDICES

A. Limited English Proficiency Policy Information

PHA's Board-approved Limited English Proficiency Policy (LEP) commits the agency to taking "...all reasonable steps to ensure that PHA's programs, services, and activities are accessible to persons with Limited English Proficiency. This is consistent with PHA's goal to provide equal housing opportunities for all qualified applicants and residents and its commitment to prohibiting discrimination on the basis of national origin, in PHA's selection of families and provision of services.

PHA has designated an LEP Coordinator, and has posted its Language Access Policy (LAP) on the PHA website at this link: http://www.pha.phila.gov/media/164231/lep_policy_4_1_13.pdf.

PHA's website incorporates the Google Translate feature that allows users to translate any web page into an extensive menu of available languages. Further, as part of its commitment to promoting open access to PHA programs and services, PHA provides translations of other documents, telephone translations and in-person translation services upon request. Where possible and appropriate, bilingual PHA staff provide telephone and in-person translation services directly in accordance with the LAP.

Below is information on third-party telephone and in-person translation services utilized in FY 2024. Please note that oral translation services provided by PHA bilingual staff are not included in the numbers below.

Telephone Translation Services Provided in FY 2024

Language	Number of Calls	Minutes
Amharic	0	0
Mandarin	9	180
Russian	21	263
Spanish	986	8,225
Vietnamese	0	0
French	8	81
Mandarin	0	0
Total	1,024	8,749

In Person Translation Services Provided in FY 2024

Language	Requested	Serviced	Canceled
American Sign Language	3	1	2
Spanish	8	8	0
Total	11	9	2

Video Remote Interpretation Services Provided in FY 2024

Language	Requested	Serviced	Canceled/Unable to Provide
American Sign Language	8	6	2
Spanish	30	28	2
Total	38	34	4

Forms and Notices

PHA documents are translated on an ongoing basis in response to the needs and/or specific requests of applicants, HCV participants, public housing residents, vendors and the general public. PHA maintains a library of documents that have been translated into Spanish, the primary language spoken by non-English speakers that are served by PHA programs. PHA has also translated the public housing lease, lease addenda and related notices along with various other materials into Russian and Chinese. Periodically, HUD also makes available translated versions of standard HUD forms and other documents used in the Public Housing and HCV programs.

B. Local Asset Management Plan

No changes were made during the Plan Year to the Local Asset Management Plan. See attached.

LOCAL ASSET MANAGEMENT PLAN

Introduction

Pursuant to the First Amendment to the Moving to Work Agreement, in Fiscal Year 2010 (MTW Year Nine) the Philadelphia Housing Authority has implemented a local asset management plan for its Public Housing Program as described herein. In the implementation of the plan, PHA will continue to adopt cost accounting and financial reporting methods that comply with HUD and federal regulations and generally accepted accounting practices.

PHA's plan supports and is consistent with the agency's ongoing implementation of project-based management, budgeting, accounting and financial management. PHA's project-based management system emphasizes the provision of property management services that have met agency-wide standards while responding to the unique needs of each property. Day to day operations of PHA sites are coordinated and overseen by Property Managers assigned to each property. PHA Property Managers oversee the following management and maintenance tasks:

- Marketing and tenant selection
- Rent collections
- Routine and preventive maintenance
- Unit turnover
- Security
- Resident services
- Resident and community relations
- Capital improvements planning
- Other activities necessary to support the efficient operations of the site

In the implementation of these project level management activities, other PHA departments including Public Safety, Maintenance, Development, ISM, Finance and Budget, Human Resources, Community Operations & Resident Development, Office of General Counsel, Supply Chain Management, and the Office of Audit and Compliance support PHA Property Managers. Property Managers have access to on-line detailed and summary management reports on budget status, waitlist management, key performance indicators to facilitate their monitoring and oversight of property level activities. PHA also conducts Performance Management meetings on a monthly basis, to allow for a thorough review of key performance indicators at the individual site and system-wide levels.

PHA Property Managers develop and monitor property budgets, with support from the PHA Finance and Budget staff. Budget trainings are held annually to support the budget development process. Property Managers are provided with tools to develop their budget estimates including property-specific non-utility and utility cost data from the prior 18 months.

PHA's local asset management plan is consistent with the principles of asset management described in 24 CFR 990.255 and in the First Amendment to PHA's MTW Agreement. Further, the plan is generally consistent with the provisions of 24 CFR 990.260, 990.265, 990.270, 990.275 and 990.285. As allowed under the First Amendment to the MTW Agreement, PHA's local asset

management plan deviates from parts of 24 CFR 990.280, including requirements related to property management fees and fees for services. PHA will utilize the Cost Allocation method referenced in paragraph 6.F.4.b of the First Amendment.

Due to the unique features of the Philadelphia market, PHA's housing portfolio, and the agency, PHA has determined that use of the Cost Allocation method is the most efficient, cost-effective means of achieving the asset management principles referenced above. The factors that impact PHA's asset management plans include, but are not necessarily limited to, the following:

- Scattered Site Portfolio. PHA has approximately 3,700 scattered site units, which represents nearly 1/3 of its public housing portfolio. We understand this is far and away the largest scattered site public housing portfolio in the country. The geographic diversity of these scattered site units impacts warehouse operations, locations and numbers of management offices, and staffing requirements.
- Aging Housing Stock. PHA operates one of the oldest public housing stocks in the country. It is costlier to operate than newer housing. PHA has engaged in an aggressive development program during the last few years to upgrade and redevelop its units. Due to a lack of adequate funds, this process is far from complete.
- Unionized Workforce. PHA has a heavily unionized workforce. Currently, PHA has contracts with approximately 11 unions. This significantly impacts the operations and costs of PHA's activities. As such, PHA's asset management plan is structured to be cost effective within the limits of these contracts.
- MTW Initiatives. Since the onset of its participation in MTW, PHA has sought to use its MTW flexibilities to implement agency-wide cost-cutting initiatives that will increase efficiencies, maximize use of federal dollars, and benefit PHA's clients. PHA has moved many functions to the site-based level, however a number of MTW initiatives require central administration so they can be adequately measured. For example, PHA has implemented innovative technological systems to maximize efficiencies in admissions, property management, and client services. There are costs associated with development and implementation of these systems before they are implemented at the site level. Under MTW, PHA has also implemented departmental oversight protocols through its Quality Assurance Program. PHA's quality control program has already made PHA's programs more efficient by reducing errors and improving oversight.
- Local Costs. Philadelphia is an old, industrial city where labor costs for maintenance and construction activities are significant. These high costs can be attributed to, in part, prevailing wage requirements as well as the cost of materials and services in the Philadelphia market.

A description of the cost allocation plan and other technical components of PHA's local asset management plan follows:

I. AMP Definitions

An AMP will include any site that receives Operating Subsidies through HUD's Operating Fund Calculation. PHA currently has two types of PHA managed AMPs and PAPMC/AME managed AMPs.

II. Balance Sheet Items (Assets, Liabilities & Equity)

PHA has distributed balance sheet accounts by AMPs as planned in the original Local Asset Management balance sheet accounts were analyzed and distributed between the AMPs and the Indirect Cost Departments.

A. Cash & Investments

PHA maintains consolidated physical bank accounts, but for financial statement presentation cash is distributed between all PHA AMPs and the Indirect Cost Departments. Direct cash and expenses are charged to the proper AMPs or Indirect Cost Departments general ledger account. At the end of the year, cash is adjusted to offset indirect cost allocations between the AMPs and the Indirect Cost Departments. The offsetting of the indirect cost allocations effectively adjusts the inter fund balances to zero except where the AMPs have a negative cash balance which is presented as an inter-fund to the Indirect Cost Departments. All remaining cash and investment balances are presented with the Indirect Cost Departments and reported in the MTW Column of the FDS.

Investment income will be allocated between the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

B. Tenant Accounts Receivable and Allowance for Doubtful Accounts

Tenant accounts receivable balances and allowance for doubtful accounts are reported on an AMP basis for each of the PHA Managed AMPs. The ending balances are reconciled to the tenant supporting detail ledgers,

PAPMC/AME Managed AMPs tenant balances are not reported as AMPs in the FDS. Based on PHA's analysis of GASB pronouncements, these AMPs are presented as either a discrete component unit or blended component unit. Tenant accounts receivable and allowance for doubtful accounts are included in the PHA Audited financial statements as a discretely presented component unit.

C. Other Accounts Receivable

Other accounts receivable will be distributed based on the purpose and source of the receivable. Receivables related to a PHA Managed AMP and PAPMC / AME Managed AMP will be distributed to the specific AMP. Any receivable that is not associated to a specific AMP will be distributed to the Indirect Cost Departments.

D. PHASI / Worker's Compensation Cash and Liabilities

The PHASI and Worker's Compensation cash and liabilities will remain with the Indirect Cost Departments and reported in the MTW column of the FDS. At this time, PHA has determined that these liabilities are PHA Agency Wide liabilities and not liabilities of the PHA Managed AMPs or the Indirect Cost Departments. The expenses related to the PHASI liability and worker's compensation liability are charged to appropriate programs or AMPs. PHA has created a cash reserve for the PHASI liability. The cash reserve offsets PHA's liabilities so that the liability is fully funded. PHA utilizes the reserves to pay the liability as needed. PHA has a cash reserve that is held by the Worker's Compensation insurer.

E. Prepaid Insurance

The prepaid insurance balances for the PHA Managed AMPs will be distributed to AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

PAPMC/AME Managed AMPs will not be included in the AMPs Columns of the FDS. Prepaid insurance is included in the PHA Audited financial statements as either a blended or discretely presented component unit.

F. Materials Inventory and Allowance for Obsolete Inventory

PHA currently maintains all maintenance materials inventory centrally. AMPs and departments submit requests for inventory and materials are issued then expenses are charged to the appropriate AMP or program. Ending centralized materials inventory and allowance balances for the PHA Managed AMPs will be distributed to AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

PAPMC/AME Managed AMPs will not be included in the AMPs Columns of the FDS. Materials inventory is included in the PHA Audited financial statements as either a blended or discretely presented component unit.

G. Fixed Assets and Accumulated Depreciation

Fixed assets and accumulated depreciation will be reconciled to the PeopleSoft Asset Module and distributed to the appropriate PHA Managed AMPs and the Indirect Cost Departments. PHA's Asset Management (AM) Module has been established for many years. AM provides PHA with the ability to prepare fixed asset and depreciation reports by AMP or department. AM tracks all fixed assets transactions and records all monthly fixed asset entries. Fixed assets and accumulated depreciation are reported with the appropriate AMP or the MTW Column for assets held by the Indirect Cost Departments.

PAPMC/AME Managed AMPs will not be included in the AMPs Columns of the FDS. Fixed assets and accumulated depreciation are included in the PHA Audited financial statements as either a blended or discretely presented component unit.

H. Accounts Payable and Accrued Liabilities

Other accounts payable and accrued liabilities include all liabilities not specifically referred to in the following detailed liability categories. Other accounts payable and accrued liabilities will be distributed based on the purpose and source of the payable or liability. Payables or liabilities related to a PHA Managed AMP and PAPMC / AME Managed AMP will be distributed to the specific AMP. Any payable or liability that is not associated to a specific AMP will be distributed to the Indirect Cost Departments.

I. Payroll Liabilities

All payroll tax and benefits liabilities will continue to be presented with the Indirect Cost Departments and reported in the MTW Column of the FDS. At this time, PHA has determined that these liabilities are PHA Agency Wide liabilities and not liabilities of the PHA Managed AMPs or the Indirect Cost Departments. However, PHA has utilized the LIPH (Fund 001) cash accounts in the past to pay most Agency Wide liabilities, then the LIPH (Fund 001) will receive reimbursements from other programs where applicable. The expenses related to the payroll liabilities will continue to be charged to appropriate programs or AMPs.

Accrued salaries and wages liability will be distributed to/ between AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

J. Compensated Absences

Compensated absences liabilities will be distributed to/between the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

No compensated absences liabilities will be distributed to the PAPMC / AME AMPs because the PAPMC/AME AMPs are charged salaries and benefits for the direct use of PHA staff.

K. Net Position

Invested in Capital Assets balances will follow the Net Fixed Assets that are owned by an AMPs or Departments. Invested in capital assets will be distributed between the Indirect Cost Departments and the PHA Managed AMPs based on where the Net Fixed Assets is distributed.

The Public Housing Program Unrestricted Net Position for all AMPs will be the net of the accumulated direct and indirect operating revenues and expenses for each AMP.

PAPMC/AME Managed AMPs will not be included in the AMPs Column of the FDS. Invested in capital assets are included in the PHA Audited financial statements as a blended or discretely presented component unit. Unrestricted net position for the PAPMC / AME Managed AMPs from their operating activities will be presented in PHA's Audited financial statements as a blended or discretely presented component unit. Each of these AMPs will have an unrestricted net position in the AMPs Column of the FDS which is the net accumulated excess or deficiency of operating subsidy revenue and operating subsidy paid to the AMPs and the net of the allocation of PHA's indirect expenses.

III. Revenues

A. Tenant Revenues

1. PHA Managed AMPs

Tenant Revenues will be directly charged to the appropriate AMP.

2. PAPMC/AME Managed AMPs

PAPMC/AME Managed AMPs will not be included in the AMPs Column of the FDS. Tenant revenue is included in the PHA Audited financial statements as either a blended or discretely presented component unit.

B. Direct Revenues

Direct revenues include tenant fees and service charges that can be identified and charged to a specific site.

1. PHA Managed AMPs

PHA currently records all direct revenues to the proper PHA Managed AMP. PHA currently records all tenant charges and any direct revenue to the proper PHA Managed AMP. PHA's account structure includes the program code (AMP number) and the appropriate department code, which enables PHA to charge the revenues to the proper PHA Managed AMPs.

PHA's systems and procedures related to direct revenues currently in application are in compliance with asset-based accounting. PHA's systems and procedures will require no transition period or transition procedures to comply with asset-based accounting requirements of presenting all direct revenues under the proper AMP.

2. PAPMC/AME Managed AMPs

PAPMC/AME Managed AMPs will not be included in the AMPs Column of the FDS. Direct revenues are included in the PHA Audited financial statements as either a blended or discretely presented component unit.

C. Indirect Revenues

Indirect revenues are other income items that cannot be identified or charged to a specific AMP or to the Indirect Cost Departments. Indirect revenues will be allocated between the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

D. HUD Operating Subsidy

For PHA's project-based accounting purposes, Operating Subsidy is considered an indirect revenue source. PHA's Operating Subsidy is provided in one block as if PHA were one AMP. The funding for all AMPs is calculated using the same Allowable Expense Level per PHA's MTW agreement. Since the basis of the funding calculation is the same across all AMPs, PHA considers Operating Subsidy an indirect revenue source.

Operating Subsidy will be allocated to all PHA AMPs based on the number of units eligible for operating subsidy from the most recent HUD approved Operating Fund Calculation.

E. Operating Transfers from the MTW Block (Excess HAP) & CFP

1. PHA Managed AMPs

PHA has included in its MTW annual plan Operating Transfers from the MTW Program and the CFP Program into the Public Housing Program to offset operating expenses. PHA has determined that the appropriate treatment of Operating Transfers at the current time based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation. PHA will establish separate account numbers for the MTW and CFP Operating Transfers. The Operating Transfers are made to assist the PHA Managed AMPs with its operations. PHA may need to adjust the allocation of the Operating Transfers in fiscal years to assist the operating needs of one AMP over another AMP that may not need the assistance. PHA's MTW agreement with HUD permits the PHA flexibility to move funds between its Public Housing, Section 8 HCV, and CFP programs. PHA will reserve the right to adjust the allocations of the Operating Transfers to meet the financial needs of all the PHA Managed AMPs.

2. PAPMC / AME Managed AMPs

Operating Transfers will not be allocated to the PAPMC / AME Managed AMPs.

IV. Expenses

A. Direct Expenses

1. PHA Managed AMPs

PHA currently records all direct expenses to the proper AMP. PHA's procurement and accounts payables processes include assigning the proper chart fields or account structure. PHA's account structure includes the program code (AMP number) and the appropriate department code.

For payroll, PHA directly charges all payroll costs using account labels. Account labels are used to tell PHA's accounting system where to directly charge an employee's payroll costs. PHA can setup as many account labels as needed to have payroll costs charged to the proper program, department, AMP, etc. based on PHA's requirements. PHA's accounting system gives the Authority the automated ability to charge payroll costs from the employee timesheets to the proper account. When employees complete their weekly timesheets, the employees report all hours to account labels. The timesheets allow employees to charge as many account labels as needed during the week. Employees submit their timesheets to their direct supervisor for approval. The direct supervisor verifies that the correct account labels were used.

PHA's systems and procedures related to direct expenses currently in application are in compliance with asset-based accounting. PHA's systems and procedures will require no transition period or transition procedures to comply with asset-based accounting requirements of presenting all direct revenues and expenses under the proper AMP.

2. PAPMC/AME Managed AMPs

The only PAPMC/AME Managed AMPs direct expenses that will be included in AMPs FDS column are PHA's payment of Operating Subsidies and any other direct expense paid by PHA. All other direct expenses are included in the PHA Audited financial statements as either a blended or discretely presented component unit.

B. Corporate Legal

PHA has diverse legal issues due to the size of its programs. PHA will analyze legal expenses to determine the appropriate treatment of the legal expenditures. The treatments of the legal expenses are as follows:

1. Direct Legal Expenses

Legal expenses that can be identified as a direct cost to a specific AMP will be charged to that AMP.

2. Indirect Legal Expenses

Indirect legal expenses that cannot be defined as costs for a specific AMP but can be identified as providing benefits to the PHA Managed AMPs based on the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

C. Payroll Expenses

PHA currently directly charges all maintenance payroll costs to the direct PHA Managed AMP. PHA directly charges all payroll costs using account labels. Account labels are used to tell PHA's accounting system where to directly charge a maintenance employee's payroll costs. PHA can setup as many account labels as needed to have payroll costs charged to the proper PHA Managed AMP. PHA's accounting system gives the Authority the automated ability to charge maintenance payroll costs from the employee timesheets to the proper account. When maintenance employees complete their weekly timesheets, the employees report all hours to account labels. The timesheets allow maintenance employees to charge as many account labels as needed during the week. Maintenance employees submit their timesheets to their direct supervisor for approval. The direct supervisor verifies that the correct account labels were used.

D. Materials and Contract Costs

PHA currently records all maintenance materials and contract costs directly to the proper PHA Managed AMP. PHA's procurement and accounts payables processes include assigning the proper chart fields or account structure. PHA's account structure includes the program code (AMP number) and the appropriate department code.

PHA's systems and procedures related to maintenance materials and contract costs currently in application are in compliance with asset-based accounting. PHA's systems and procedures will require no transition period or transition procedures to comply with asset-based accounting requirements of presenting all direct revenues and expenses under the proper AMP.

E. Indirect Expenses

PHA will be using an allocation to charge overhead from the Indirect Cost Departments (MTW Column) to all AMPs. Overhead costs will be allocated to the AMPs based the number of units eligible for subsidy from the most recent HUD approved Operating Fund Calculation.

V. Capital Fund Program

All expenditures under the Capital Fund program are charged to the appropriate AMP or Indirect Cost Department. Revenues are applied to the appropriate AMP or Indirect Cost

Department based on the actual expenditures. The expenditures related to the Indirect Cost Departments or MTW initiatives are reported in the MTW Column of the FDS.

Although PHA is an MTW agency and is not required to, PHA reports and tracks all CFP expenditures based on the CFP Budget Line Items. PHA has determined this method to be accurate and efficient method to track CFP expenditures.

VI. Project Based Budgeting

PHA currently prepares project based operating budgets for all the Amps and departments. PHA adds all the budgets to the Automated Accounting System. The operating budgets are currently used in the procurement, accounts payable process and the preparation of monthly financial statements. PHA's operating budget process is currently in compliance with the HUD Project Based Budgeting requirements.

When PHA has prepared its Capital Fund Program Budgets, PHA determines specific capital work items that need to be completed at all or some of PHA sites. PHA does not establish a Capital Budget by site, but by work item. Then once PHA determines which sites PHA will perform the work item, PHA reclassifies the budget amount from a PHA Wide work item to the specific site. PHA will continue this process; however, the budget will be established at the Capital Projects category rather than PHA Wide

C. Board Certification of Compliance with MTW Statutory Objectives

RESOLUTION NO. 12358

**RESOLUTION APPROVING THE PHILADELPHIA HOUSING AUTHORITY'S ANNUAL
MOVING TO WORK REPORT FOR FISCAL YEAR 2024 FOR SUBMISSION TO THE U.S.
DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT AND CERTIFYING THAT THE
THREE STATUTORY REQUIREMENTS HAVE BEEN MET**

WHEREAS, the U.S. Department of Housing and Urban Development ("HUD") requires the Philadelphia Housing Authority ("PHA"), as a participant in the Moving to Work Demonstration Program ("MTW"), to submit an Annual Report on the status of its programs, operations, and finances in a form specified and required by HUD; and

WHEREAS, under the MTW Agreement, HUD will assess PHA's performance on an annual basis by comparing, at the end of PHA's fiscal year, its goals as stated in its approved MTW Annual Plan, to its actual performance, as stated in its Annual Report; and

WHEREAS, PHA must include in the MTW Annual Report all required elements as described in the MTW Agreement; and

WHEREAS, Attachment B of the MTW Agreement, HUD Form 50900 Section VI (C), requires a certification in the Annual Report that PHA has met the three MTW statutory requirements of: 1) ensuring that at least 75 percent of the households assisted by PHA are very low-income; 2) continuing to assist substantially the same total number of households as would have been assisted had PHA not participated in the MTW Demonstration Program; and 3) maintaining a comparable mix of households (by family size) served as would have been had PHA not participated in the MTW Demonstration Program; and

WHEREAS, the Annual Report must be submitted ninety (90) days after the end of PHA's fiscal year; and

WHEREAS, PHA's fiscal year ended on March 31, 2024 and its Annual Report is due to HUD on or before June 30, 2024; and

WHEREAS, PHA has prepared its Annual MTW Report for Fiscal Year 2024, which is ready for timely submission to HUD and which contains all the required elements;

BE IT RESOLVED, that the PHA Board of Commissioners hereby approves PHA's Annual Report for the MTW Demonstration Program for Fiscal Year 2024 (period ending March 31, 2024), as distributed to the Board, for submission to HUD, and certifies that the report reflects that PHA has met the three MTW statutory requirements of: 1) ensuring that at least seventy-five (75) percent of the households assisted by PHA are very low-income families; 2) continuing to assist substantially the same total number of households as would have been assisted had PHA not participated in the MTW Demonstration Program; and 3) maintaining a comparable mix of households (by family size) served as would have been served had PHA not participated in the MTW Demonstration Program; and authorizes the President & CEO and/or his designee(s) to undertake all necessary actions including, but not limited to, responding to HUD comments and requests for additional information, in order to secure HUD approval for the MTW Annual Report.



I hereby certify that this was
APPROVED BY THE BOARD ON 6/20/2024
Quinn M. Radtke
ATTORNEY FOR PHA