

SUBMITTED MARCH 21, 2023

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I. INTRODUCTION

OVERVIEW OF MTW GOALS AND OBJECTIVES

This 2022 Annual Report highlights the activities of Boulder Housing Partners (BHP) in our eleventh year as a participant in the Moving to Work (MTW) demonstration program. We continued monitoring our current activities.

The extraordinary events since 2020 highlighted the need for creative and quick responses to the families that we serve, the reminder that we are all in this together and that it truly does take a village to do the hard work we do. The pandemic also taught us to think outside the box and become more adept at using technology where possible. BHP rolled out videos for voucher briefings, implemented an online portal for recertifications and kicked off an HCV Educational Session Series for participants and applicants. We are currently producing an applicant video, creating electronic signature forms, and working to implement an applicant portal for online applications and intake certifications.

2021 was a historic year for BHP, and the housing world, with the birth of the Emergency Housing Voucher program through the American Rescue Plan (ARPA) Act. BHP was able to put all these vouchers in use over the course of 2022. Voucher recipients who were experiencing homelessness were welcomed to their new home with a welcome kit which provided many basic needs.

In 2022, we received 14 vouchers under the Fair Share allocation of vouchers. These vouchers were added to our MTW pool in October 2022. We were awarded (yet again!) an additional 10 Mainstream Vouchers (which serve households with a member who has a disability), which brings our total of Mainstream Vouchers to 188.

Since our inception in the MTW Program, BHP has:

- Implemented rent reform with triennial recertifications for households who are elderly and/or persons with a disability.
- Implemented a flat tiered rent structure and biennial recertifications for our work-able families.
- Eliminated the need for all Housing Choice families to report income increases prior to their next regularly scheduled recertification.
- Eliminated the 40% cap of income towards rent for Housing Choice voucher holders.
- Simplified the utility allowance schedule for Housing Choice voucher households and eliminated utility reimbursement payments.
- Tied the Housing Quality Standards (HQS) inspection to the recertification cycle.
- Offered housing and services to victims of domestic violence with our partner Safehouse Progressive Alliance for Non-Violence (SPAN).

- Used Replacement Housing Factor Funds to create 1175 Lee Hill, a 31–unit community to house individuals who have experienced chronic homelessness.
- Created a Development and Acquisition Fund which allowed us to purchase 27 units of affordable housing and 5.25 acres of land.
- Converted 312 units of public housing through Section 18 Disposition and the Rental Assistance Demonstration Program, while creating 3 new community centers and renovating all units to like-new conditions.
- Created the Bringing School Home Program, which focuses on families with children under 6 and offers services so children are school-ready by kindergarten.
- Implemented a new escrow model for families in the Family Self Sufficiency program to allow for escrow based on goals achieved along with escrow based on earned income.

OVERVIEW OF BHP’S LONG–TERM VISION FOR THE MTW PROGRAM

With the final rule of Housing Opportunities Through Modernization Act (HOTMA) being released, changes will be coming to BHP’s current MTW activities. Some may be closed out completely and others will need some adjustments, as HOTMA is bringing efficiencies to the regulations in general and MTW authority will not be needed for some of our activities. As described in full detail in the 2022 MTW Annual Plan, Boulder Housing Partners will be focusing on these main areas in the coming years: 1) Transforming Bureaucracy; 2) Increasing Housing Choice; 3) Bringing School Home; and 4) Completing the Conversion of Public Housing.

1) Transforming Bureaucracy: People, Not Paper

We continue to focus on ways to streamline all aspects of the housing program, to have more time to focus on people.

2) Increasing Housing Choice

In 2022, we added 24 vouchers (14 Fair Share vouchers and 10 Mainstream Vouchers). We did not add any units in 2022, however, our development pipeline currently shows 200+ affordable units coming online over the next few years.

3) Bringing School Home: Disrupting the Cycle of Poverty

We continue to focus on the idea that poverty continues to be a bar to learning and quality affordable housing can change that. By expanding services to include children at a younger age (0 to 5), we believe we can break the cycle of poverty in two generations.

4) Completing the Conversion of Public Housing

BHP continues to own 14 units of Public Housing. We are working with HUD to determine the next steps to dispose of these remaining units.

II. GENERAL HOUSING AUTHORITY OPERATING INFORMATION

A. HOUSING STOCK INFORMATION

i. Actual New Project Based Vouchers

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

| PROPERTY NAME | NUMBER OF VOUCHERS NEWLY PROJECT-BASED | | STATUS AT END OF PLAN YEAR** | RAD? | DESCRIPTION OF PROJECT |
|---------------|--|--------|------------------------------|------|---|
| | Planned* | Actual | | | |
| Mount Calvary | 15 | 0 | Committed | No | 15 of the 60 units at Mt. Calvary will be project-based vouchers dedicated to serve chronically homeless seniors. |

| | |
|----|---|
| 15 | 0 |
|----|---|

Planned/Actual Total Vouchers Newly Project-Based

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.

** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

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

Construction started later than anticipated. Units were not done at the end of 2022. Projected completion date is late 2023/early 2024.

ii. Actual Existing Project Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP was in place by the beginning of the Plan Year. Indicate whether the unit is included in RAD.

| PROPERTY NAME | NUMBER OF PROJECT-BASED VOUCHERS | | STATUS AT END OF PLAN YEAR** | RAD? | DESCRIPTION OF PROJECT |
|------------------|----------------------------------|--------|------------------------------|------|--|
| | Planned* | Actual | | | |
| 1175 Lee Hill | 31 | 31 | Leased/Issued | No | Permanently supportive housing for the chronically homeless |
| 30Pearl | 20 | 20 | Leased/Issued | No | Supportive housing for developmentally disabled (mix of MTW and Mainstream vouchers) |
| Broadway East | 44 | 44 | Leased/Issued | No | Public housing units converted in 2006 |
| Diagonal Court | 30 | 30 | Leased/Issued | Yes | Public housing units converted in 2015 |
| Holiday McKinney | 10 | 10 | Leased/Issued | No | Permanently supportive housing for the chronically homeless |
| Iris Hawthorn | 14 | 14 | Leased/Issued | Yes | Public housing units converted in 2015 |
| Kalmia | 49 | 49 | Leased/Issued | No | Public housing units converted in 2015 |
| Manhattan | 41 | 41 | Leased/Issued | Yes | Public housing units converted in 2015 |
| Madison | 33 | 33 | Leased/Issued | Yes | Public housing units converted in 2020 |
| Northport | 50 | 50 | Leased/Issued | Yes | Public housing units converted in 2015 |
| Walnut Place | 95 | 95 | Leased/Issued | No | Public housing units converted in 2015 |
| Woodlands | 35 | 35 | Leased/Issued | No | Family Self Sufficiency Program with a partner agency |

452

452

Panned/Actual Total Existing Project-Based Vouchers

* Figures and text in the “Planned” column should match the corresponding Annual MTW Plan.

** Select “Status at the End of Plan Year” from: Committed, Leased/Issued

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

N/A

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

Examples of the types of other changes can include (but are not limited to): units held off-line due to relocation or substantial rehabilitation, local, non-traditional units to be acquired/developed, etc.

| ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN THE PLAN YEAR |
|--|
| HUD provided BHP with 14 Fair Share vouchers; funding began in October 2022. |

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

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

| GENERAL DESCRIPTION OF ALL ACTUAL CAPITAL EXPENDITURES DURING THE PLAN YEAR |
|--|
| BHP spent a total of \$417,602 of Capital Funds in 2022: Capital funds; \$300,000 for Mt. Calvary (new construction of 60 total units of senior housing) and \$117,602 to support normal MTW operations. |

B. LEASING INFORMATION

i. Actual Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA actually served at the end of the Plan Year.

| NUMBER OF HOUSEHOLDS SERVED THROUGH: | NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | | NUMBER OF HOUSEHOLDS SERVED** | |
|--|--|--------|-------------------------------|--------|
| | Planned^^ | Actual | Planned^^ | Actual |
| MTW Public Housing Units Leased | 156 | 164 | 13 | 14 |
| MTW Housing Choice Vouchers (HCV) Utilized | 10,800 | 10,927 | 900 | 911 |
| Local, Non-Traditional: Tenant-Based | 0 | 0 | 0 | 0 |
| Local, Non-Traditional: Property-Based | 312 | 301 | 26 | 25 |
| Local, Non-Traditional: Homeownership | 0 | 0 | 0 | 0 |
| | 11,268 | 11,392 | 939 | 961 |

Planned/Actual Totals

* “Planned Number of Unit Months Occupied/Leased” is the total number of months the MTW PHA planned to have leased/occupied in each category throughout the full Plan Year (as shown in the Annual MTW Plan).

** “Planned Number of Households to be Served” is calculated by dividing the “Planned Number of Unit Months Occupied/Leased” by the number of months in the Plan Year (as shown in the Annual MTW Plan).

^^ Figures and text in the “Planned” column should match the corresponding Annual MTW Plan.

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

Housing Choice Voucher occupancy rates were stable, more so than anticipated in 2022.

| LOCAL, NON-TRADITIONAL CATEGORY | MTW ACTIVITY NAME/NUMBER | NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | | NUMBER OF HOUSEHOLDS TO BE SERVED* | |
|---------------------------------|--|--|--------|------------------------------------|--------|
| | | Planned^^ | Actual | Planned^^ | Actual |
| Tenant-Based | N/A | 0 | 0 | 0 | 0 |
| Property-Based | 2015-1 Affordable housing acquisition and development fund | 312 | 301 | 26 | 25 |
| Homeownership | N/A | 0 | 0 | 0 | 0 |

| | | | |
|-----|-----|----|----|
| 312 | 301 | 26 | 25 |
|-----|-----|----|----|

Planned/Actual Totals

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

^^ Figures and text in the “Planned” column should match the corresponding Annual MTW Plan.

| HOUSEHOLDS RECEIVING LOCAL, NON-TRADITIONAL SERVICES ONLY | AVERAGE NUMBER OF HOUSEHOLDS PER MONTH | TOTAL NUMBER OF HOUSEHOLDS IN THE PLAN YEAR |
|---|--|---|
| N/A | N/A | N/A |

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

Discussion of any actual issues and solutions utilized in the MTW housing programs listed.

| HOUSING PROGRAM | DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS |
|----------------------------|---|
| MTW Public Housing | There was less turnover in the public housing units than anticipated. |
| MTW Housing Choice Voucher | Utilization rate was higher than anticipated, with an annualized occupancy rate of 98.7%. |
| Local, Non-Traditional | A few units were vacant longer than expected. |

C. WAITING LIST INFORMATION

i. Actual Waiting List Information

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The “Description” column should detail the structure of the waiting list and the population(s) served.

| WAITING LIST NAME | DESCRIPTION | NUMBER OF HOUSEHOLDS ON WAITING LIST | WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED | WAS THE WAITING LIST OPENED DURING THE PLAN YEAR |
|-------------------|--------------------|--------------------------------------|---|--|
| Arapahoe Court | PH site-based list | 25 | Closed | Yes |
| HCV Lottery | Lottery for HCV | 30 | Closed | Yes |

Please describe any duplication of applicants across waiting lists:

There are no duplications between the waiting lists.

ii. Actual Changes to Waiting List in the Plan Year

Please describe any actual changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

| WAITING LIST NAME | DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST |
|-------------------|---|
| Arapahoe Court | The list was open March 22 – 24, 2022. |
| HCV Lottery | The lottery was open May 17 – 18, 2022. |

D. INFORMATION ON STATUTORY OBJECTIVES AND REQUIREMENTS

i. 75% of Families Assisted Are Very Low Income

HUD will verify compliance with the statutory requirement that at least 75% of the households assisted by the MTW PHA are very low income for MTW public housing units and MTW HCVs through HUD systems. The MTW PHA should provide data for the actual families housed upon admission during the PHA’s Plan Year reported in the “Local, Non-Traditional: Tenant-Based”; “Local, Non-Traditional: Property-Based”; and “Local, Non-Traditional: Homeownership” categories. Do not include households reported in the “Local, Non-Traditional Services Only” category.

| INCOME LEVEL | NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR |
|------------------------------|---|
| 80%-50% Area Median Income | 3 |
| 49%-30% Area Median Income | 5 |
| Below 30% Area Median Income | 2 |

Total Local, Non-Traditional Households Admitted

| |
|-----------|
| 10 |
|-----------|

ii. Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

| BASELINE MIX OF FAMILY SIZES SERVED (upon entry to MTW) | | | | | |
|---|-------------------------------|---------------|----------------------|---------------------|-------------------------|
| FAMILY SIZE | OCCUPIED PUBLIC HOUSING UNITS | UTILIZED HCVs | NON-MTW ADJUSTMENTS* | BASELINE MIX NUMBER | BASELINE MIX PERCENTAGE |
| 1 Person | 188 | 268 | 0 | 456 | 49.03% |
| 2 Person | 17 | 145 | 0 | 162 | 17.42% |
| 3 Person | 23 | 61 | 0 | 84 | 9.03% |
| 4 Person | 46 | 66 | 0 | 112 | 12.04% |
| 5 Person | 46 | 42 | 0 | 88 | 9.46% |
| 6+ Person | 10 | 18 | 0 | 28 | 3.01% |
| TOTAL | 330 | 600 | 0 | 930 | 100.00% |

* “Non-MTW Adjustments” are defined as factors that are outside the control of the MTW PHA. An example of an acceptable “Non-MTW Adjustment” would include demographic changes in the community’s overall population. If the MTW PHA includes “Non-MTW Adjustments,” a thorough justification, including information substantiating the numbers given, should be included below.

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

No adjustments have been made to the baseline. In 2015, BHP converted 283 units of public housing to housing choice vouchers. In 2020, BHP disposed of 34 units of Public Housing, which were replaced with 33 Tenant Protection Vouchers. These households are now included under the HCV program.

| MIX OF FAMILY SIZES SERVED (in Plan Year) | | | | |
|---|---------------------------|---|--|---|
| FAMILY SIZE | BASELINE MIX PERCENTAGE** | NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^ | PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^ | PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR |
| 1 Person | 49% | 511 | 55% | 6.21% |
| 2 Person | 17% | 177 | 19% | 1.72% |
| 3 Person | 9% | 108 | 12% | 2.65% |
| 4 Person | 12% | 69 | 7% | -4.58% |
| 5 Person | 9% | 31 | 3% | 6.11% |
| 6+ Person | 3% | 29 | 3% | 0.13% |
| TOTAL | 100% | 925 | 100% | 99% |

** The “Baseline Mix Percentage” figures given in the “Mix of Family Sizes Served (in Plan Year)” table should match those in the column of the same name in the “Baseline Mix of Family Sizes Served (upon entry to MTW)” table.

^ The “Total” in the “Number of Households Served in Plan Year” column should match the “Actual Total” box in the “Actual Number of Households Served in the Plan Year” table in Section II.B.i. of this Annual MTW Report.

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the “Total” number of households served in the Plan Year. These percentages will reflect adjustment to the mix of families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline Year must be provided below.

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

BHP has not made any decisions to directly affect the changes to the mix of families served. New households are admitted to the Housing Choice Voucher program based on a lottery system.

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

Number of households, across MTW activities, that were transitioned to the MTW PHA’s local definition of self-sufficiency during the Plan Year.

| MTW ACTIVITY NAME/NUMBER | NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY* | MTW PHA LOCAL DEFINITION OF SELF SUFFICIENCY |
|---|--|--|
| 2013-3 Partnership with SPAN | 1 | Moving to market rate or homeownership |
| 2016-1 Flat tier rent for work able families | 7 | Moving to market rate or homeownership |
| 2016-2 Rent reform for elderly and persons with disabilities households | 0 | Moving to market rate or homeownership |
| 2016-4 Bringing School Home Referral Process | 0 | Moving to market rate or homeownership |
| | 0 | <i>(Households Duplicated Across MTW Activities)</i> |

Total Households Transitioned to Self Sufficiency

8

* Figures should match the outcome reported where metric SS#8 is used in Section IV of this Annual MTW Report.

III. PROPOSED MTW ACTIVITIES

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

IV. APPROVED MTW ACTIVITIES

IMPLEMENTED ACTIVITIES

ACTIVITY 2012–4

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2012–4, Rent Simplifications for all Households, was approved and implemented in 2012. The activity has not been amended.

b. DESCRIPTION/IMPACT/UPDATE

The goal of this activity was to implement a series of changes to simplify the income and asset verification process for all families. This activity:

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

This was not a rent reform activity and no hardship policy required. However, an exception policy was created in relation to the asset limit upon admission. If households qualify for the exception based on five criteria, they are allowed admission to the program. The five criteria include: 1) household is classified as elderly or a person with a disability; 2) they do not own any real estate; 3) the assets only include money in a bank account (savings, money market, etc.); 4) they plan to use the asset for assisted living in the future; and 5) they are currently living on no income or a fixed income. In 2022, seven households were denied admission for having total assets valuing more than \$50,000. Three households qualified for the exception, one denial was upheld, and three were not contested. There were 137 new admissions to the programs (two to the public housing program and 135 to the Housing Choice Voucher Program).

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|--|--|-------------------------------------|-----------------------------|---------------------|
| CE #1 – Total cost of task in dollars (decrease) asset income calculation | \$1,677 (64.5 hours x \$26 average per hour) | \$671 (Reduction of 60%) | \$425.25 (15.75 hours) | Yes |
| CE #2 – Total time to complete the task in staff hours (decrease) asset income calculation | 64.5 staff hours (86 households x 45 minutes on average) | 25.8 hours (Reduction of 60%) | 15.75 hours (21 households) | Yes |
| CE #3 – Average error rate in completing a task as a percentage (decrease) | 5% Potential for error | 3% reduction in potential for error | 2% (Reduction of 76%) | Yes |

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

There have not been any challenges in achieving the benchmarks that were laid out.

ACTIVITY 2012–5

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2012–5, Elimination of the 40% of Income Cap in the voucher program, was approved and implemented in 2012. This activity has not been amended.

b. DESCRIPTION/IMPACT/UPDATE

The goal of this activity is to increase rental choices to Housing Choice voucher holders by eliminating the 40% of income towards rent cap when they initially lease up. In 2022, nine families rented a unit where their portion of the rent was more than 40%. The average rent burden for these families is 59%, with a range of 43% to 133%.

Since implementation of this activity in 2012, we have had a total of 124 households lease up with a rent burden being more than 40%. When households choose to do this, they sign an agreement confirming their understanding that loss of housing assistance will occur if they are evicted for non-payment of rent. Not one household has lost their assistance since this choice has been offered.

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

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|---|----------|------------------------------|--------------|---------------------|
| HC #5 – Number of households able to move to a better unit as a result of the activity (increase) | Zero | 2% or 17 households per year | 9 households | No |

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

In 2022, the benchmark was not achieved. The number of voucher holders who choose this option is dependent on whether voucher holders move to another unit, where they choose to lease up, how much they are willing to pay, how the rents compare to the current payment standards, etc. We do not always achieve the benchmark, but it does allow participants greater freedom of choice and location within Boulder County.

ACTIVITY 2012–6

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2012–6, Implement a Flat Utility Allowance for the voucher program, was approved and implemented in 2012. No amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

This activity was designed to increase voucher holders’ understanding of the rent calculation, specifically how utilities affect the maximum contract rent allowed. Implementation of this activity continues to allow for less time spent during the initial briefing to explain the utility allowance. This activity did not involve rent reform and no hardship was created.

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|--|--|--|---|-----------------------------------|
| CE #1 – Total cost of task in dollars (decrease) explanation of utility allowance in briefings | \$20/briefing (45 minutes x \$26 hour) | \$15 (25% reduction) | \$10/briefing (22 minutes x \$26 hour) | Yes |
| CE #2 – Total time to complete the task in staff hours (decrease) | Average of 45 minutes per briefing | 34 minutes (25% reduction) | Average of 22 minutes per briefing | Yes |
| CE #3 – Average error rate in completing a task as a percentage (decrease) | 5% potential for error | 0% reduce to zero | 0% | Yes |
| CE #5 – Tenant Rent Share in dollars (increase) | Average utility allowance in 2011 was \$70 | Reduction of \$6 for the average utility allowance | Average utility allowance was \$63, reduction of \$7 or 10% | This outcome was achieved in 2012 |

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

The benchmarks have been achieved and will continue to allow less time spent explaining the utility allowance.

ACTIVITY 2013–1

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2013–1, Housing Quality Standards Inspection (HQS) Schedule, was written to replace Activity 2012–7 and was approved and implemented in 2013. No other amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

This activity aligns the HQS inspection with the recertification schedule. Beginning in 2013, for all households who are elderly or a person with disabilities, the inspection schedule follows the recertification schedule which is every three years. Beginning in 2014, when Activity 2014–1 was implemented, inspections for the work-able families were aligned with the biennial recertification schedule. This was not a rent reform activity; no hardship was created.

The metrics for this activity in 2020, 2021 and 2022 are skewed due to the waivers provided by HUD under the CARES Act in response to the COVID pandemic. BHP chose not to conduct annual inspections beginning in March through the end of 2020. During 2022, 639 total annual inspections were conducted (which were a combination of past years and current annual inspections). Baseline and benchmark numbers were adjusted in 2022 to reflect the increased number of voucher units requiring an HQS inspection, along with increased costs for the inspections.

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|---|---|-----------------------------|---|---|
| CE #1 – Total cost of task in dollars (decrease) inspections following the recertification schedule | 2022: \$91,001 (884 inspections x \$103 per inspection) | \$30,030 (Reduction of 66%) | \$65,817(639 inspections) 28% reduction *see note above | No |
| CE #2 – Total time to complete the task in staff hours (decrease) | Inspections are conducted by an outside contractor | N/A | N/A | N/A – savings relate to cost of outside contractor, not staff |

| | | | | |
|--|--|-----|-----|---|
| CE #3 – Average error rate in completing a task as a percentage (decrease) | Activity not designed to reduce errors | N/A | N/A | N/A – savings relate to cost of outside contractor, not staff |
|--|--|-----|-----|---|

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

Since the approval of this activity, 312 units of public housing have been converted to project-base vouchers which require the HQS inspection. The costs for inspections have also increased since 2013. The baseline data and metrics have been adjusted to reflect these changes.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

The benchmark was not achieved this year. Not all annual inspections were conducted due to COVID and were caught up earlier this year.

ACTIVITY 2013–2

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2013–2, Eliminate Utility Reimbursement Payments, was approved and implemented in 2013. No amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

The activity ensures that all public housing residents and Housing Choice Voucher participants are contributing towards their rental payment (or at a minimum to ensure that residents and participants are not receiving payments to live on housing assistance). Households who were receiving a utility reimbursement payment (URP) in April 2013 continued to receive one through March 2014, unless there was a change in their circumstances that resulted in no URP. No new instances of URP were allowed after April 1, 2013. Households met with their Voucher Specialist within the first three months of implementation. Reminders with information on utility

use and grants were sent in October 2013 and January 2014. There were 12 households who were still receiving URP as of March 31, 2014, and it was eliminated as of as of April 1, 2014, when the hardship ended.

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

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

The benchmarks for this activity were achieved in 2014 when elimination of all utility reimbursement payments occurred.

ACTIVITY 2013–3

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2013–2, Local Voucher Program in Partnership with Safehouse Progressive Alliance for Nonviolence (SPAN), was approved and implemented in 2013. No amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

This activity focuses on continuing BHP’s partnership with SPAN, providing eight families who are victims of domestic violence with housing assistance and case management services through SPAN. This activity allows BHP to use vouchers for transitional housing.

On January 1, 2022, seven families were participating in this program. Over the year, one family graduated and moved on with a voucher. Two families entered the program during 2022. One applicant was issued a voucher through this program but chose to lease up another a different BHP program. As of December 31, 2022, there were eight families participating. One was eligible to graduate in 2020, two in 2021, and two in 2022. At the end of 2022, one applicant was still searching for a unit.

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

| | | | | |
|---|-----------|--|---------|---|
| SS #8 – Number of households transitioned to self-sufficiency (increase). Self-sufficiency defined as exiting program and moving into market rental or home ownership | Zero | 4 | 1 | No |
| HC #3 – Average applicant time on wait list in months (decrease) | 12 months | 6 months (Reduce by 50% based on this being a two-year transitional program) | 1 month | Yes |
| HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase) | Zero | 8 | 8 | Yes, these families are victims of domestic violence, therefore all have moved to better situations and units |

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metric or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

In 2022, we did not graduate as many families as anticipated. Our partner also did not have as many applicants as in the past.

ACTIVITY 2013–4

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2013–4, Use of Replacement Housing Factor Funds for Other Housing, was approved and implemented in 2013. No amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

This activity allows BHP to use Replacement Housing Factor (RHF) Funds to build other affordable housing units. In 2013, BHP used RHF Funds at 1175 Lee Hill, a 31–unit community for chronically homeless using the Housing First model. Construction began in 2013, with full completion and full occupancy in November 2014. BHP did not use any RHF Funds in 2022.

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

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|--|----------|-----------|---------|---------------------|
| CE #4 – Amount of funds leveraged in dollars (increase) | Zero | Zero | Zero | Yes |
| HC #1 – Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase) | Zero | Zero | Zero | Yes |
| HC #2 – Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase) | Zero | Zero | Zero | Yes |
| HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase) | Zero | Zero | Zero | Yes |

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metric or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

Due to the timing of receipt of the funds and the nature of this being a market-driven opportunity, units will be added as the opportunity arises.

ACTIVITY 2015–1

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2015-1 allows BHP to create an Affordable Housing Acquisition and Development Fund. This activity was approved and implemented in 2015. No amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

BHP uses MTW funds to pursue opportunities in the city of Boulder to build new rental units as well as acquire existing land and/or units to increase the number of affordable housing units.

This activity is very dependent on available market opportunities. In 2022, BHP used \$2,500,000 to fund new construction of 15 units of senior housing. These units will be project-based vouchers and assist senior (age 62+) households who are chronically homeless. The project, Mount Calvary, will consist of 60 total units. HAP reserves funded \$2,200,000, the remaining \$300,000 came from Capital Fund reserves. The financial closing took place in November 2022. Demolition of the existing structure began in December. Construction began in early 2023 with an anticipated completion date of late 2023 or early 2024.

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

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|---|-------------|-------------|--|---------------------|
| <p>HC #1 – Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase).</p> | <p>Zero</p> | <p>Zero</p> | <p>2022 – 15 units; 2021 – 0; 2020 – 2 units; 2019 – 5 units; 2018 – 10.6 units; 2017 – 4.4 units; 2016 – 6 apartments, and 5.25 acres of land; 2015 – 0</p> | <p>Yes</p> |
| <p>HC #2 – Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase).</p> | <p>Zero</p> | <p>Zero</p> | <p>2022 – 0; 2021 – 0; 2020 – 0; 2019 – 0; 2018 – 0; 2017 – 0; 2016 – 0; 2015 – 0</p> | <p>Yes</p> |
| <p>HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)</p> | <p>Zero</p> | <p>Zero</p> | <p>2022 – 0; 2021 – 0; 2020 – 0; 2019 – 0; 2018 – 0; 2017 – 0; 2016 – 0; 2015 – 0</p> | <p>Yes</p> |

| | | | | |
|---|------|------|---|-----|
| CE #4 – Amount of funds leveraged in dollars (increase) | Zero | Zero | 2022 – \$2,500,000; 2021 – 0; 2020 – 0; 2019 – 0; 2018 – \$5,030,545; 2017 – \$4,565,559; 2016 – \$781,469; 2015 – 0 | Yes |
|---|------|------|---|-----|

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

The success of this activity is dependent on timing and availability of funds and market-driven opportunities. Benchmarks are all set at zero, as it is impossible to predict in any given year the number of units we may acquire or develop.

ACTIVITY 2016–1

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2016-1 replaced and amended Activity 2014–1: Rent Reform for Housing Choice Work-able Families. The activity was approved and implemented in 2016. No other amendments have been made to this activity since 2016.

b. DESCRIPTION/IMPACT/UPDATE

This activity is specifically for work-able families in the Housing Choice Voucher Program. The elements included in this rent reform are:

- *Flat tiered rent system:* total tenant payment is calculated using a two-step system. The family size and gross income place the family into an income tier. The income tier and the size of the unit determine the total tenant payment for the family. From this

amount, if applicable, the utility allowance is subtracted, a flat fee per ineligible family member is added, and any amount the gross rent exceeds the payment standard is added.

- *Minimum rent:* the minimum rent is based on bedroom size and ranges from \$120 for a zero bedroom to \$180 for a four bedroom.
- *Biennial recertification:* households are recertified every two years.
- *No interim recertification:* all interim recertifications were eliminated except for family composition or status changes, or if the family moves. Exceptions are made based on extenuating circumstances. If the household is claiming income that places them in the lowest income tier, all increases in income must be reported until the family's income places them into income tier two.
- *Flat fee per ineligible family member:* for those household members who are not legally eligible to receive housing assistance, a flat fee of \$125 per member per month is added to their total tenant payment.
- *Annual income:* The way income is calculated also changed under this activity and is either (1) current, stable income or (2) past two-year history of income. If a family reports zero income at the time of recertification, and there is a history of income, an average of the past two years is included.

There were two different hardship cases for this activity.

- *Maximum rent increases:* In 2017, all hardships for this group of work-able families were discontinued due to experiencing a change in family composition, income, contract rent increases, moving from one unit to another, or leaving the program. No further hardships were granted for this group.
- *No interim recertification:* In 2022, we received 31 requests for an interim recertification due to loss of income. Of these 31 requests, 19 were approved for an interim to be processed and their rent portion was adjusted accordingly. Of the 12 that were denied, three families were referred to the Safety Net Program and two families received multi-month assistance in the amount of \$1,000 each. One family did not contact Emergency Family Assistance Association (EFAA). The Safety Net Program was created in 2014, funded with \$25,000 and has a balance of \$2,770 remaining.

When this activity was first implemented, all households recertified at the same time, to simplify the research being done by the University of Colorado Boulder. This study was completed in 2018. In 2019 and 2020, recertification dates were matched to the lease renewal dates for all work-able families, both the tenant-based and project-based voucher holders. Recertifying hundreds of households at the same time was conducive to the research being done, but difficult for staff to manage. The conversion of 279 public housing units in 2015 and 33 units in 2020 increased the number of work-able families on the project-based voucher program. Baselines were adjusted in 2020 to reflect all the work-able families.

Average rent burden for families who were recertified in 2022 is 32%. Average income increased in 2022 to \$34,269. Seven families' income increased to the point where they were able to pay the full contract rent. They were removed from the program after the 180-day safety net was provided.

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|---|--|--|--|---------------------|
| CE #1 – Total cost of task (decrease) | \$35,235 (1,305 staff hours x \$27 per hour) | \$21,141 (40% reduction over the two-year recertification period) | \$10,773 (69% reduction) | Yes |
| CE #2 – Total time to complete the task in staff hours (decrease) | 1,305 total staff hours (3 staff hours per recertification X 435 recertifications) | 783 hours (40% reduction over the two-year recertification period) | 399 hours (133 recerts, 69% reduction) | Yes |
| CE #5 – Tenant Rent Share in dollars (increase) | \$393 (this number is prior to any rent reform being implemented) | \$365 (Increase of no more than 7%) | \$911 (increase of 132%) | No |
| SS #1 – Increase in household income | \$17,669 | \$20,904 (Increase of 2%) | \$34,269 (increase of 94%) | Yes |

| | | | | |
|---|--|---|--|-----|
| SS #3 – Increase in positive outcomes in employment status: <ul style="list-style-type: none"> - Full Time - Part Time - Educational Program - Job Training - Unemployed - Other | Employed full time – 98; Employed part time – 65; Unemployed – 24; Other – 17 | Full time: 104 (increase of 2%) Part time: 108 (increase of 2%) Educational Program: no change Job Trainee: no change Unemployed: 43 (decrease of 2%) | Employed full time – 90 (13% decrease); Employed part time – 19 (242% decrease); Educational program – 0; Job training – 0; Unemployed – 12 (50% decrease); Other – 6 (175% decrease) | No |
| SS #4 – Number of households receiving TANF (decrease) | 15 households | No decrease | 4 households | No |
| SS #5 – Number of households receiving services aimed to increase self-sufficiency | Zero | No increase | Zero | Yes |
| SS #8 – Number of families moved to self-sufficiency. Self-sufficiency defined as exiting program and moving into market rental or home ownership | Zero | 1 (one) | 7 | Yes |

c. ACTUAL NON-SIGNIFICANT CHANGES

Revisions were made to the original activity (2014-1) which were included in this activity (2016-1). No other changes have been made to this activity.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

With the 2015 conversion of 288 public housing units to the project-based voucher program, the work-able families were divided into two groups. The original Housing Choice work-able families recertified every even year, effective June 1. The converted public housing work-able families recertified every odd year, effective October 1. Beginning in 2019, we no longer recertified all the work-abled

families effective the same date, but rather on their lease renewal date. In 2020, the baselines were updated to include both groups. Work-able families continue to recertify every two years based on their admission date to the program, or their lease renewal date.

e. **ACTUAL SIGNIFICANT CHANGES**

Significant changes were made to the original activity (2014-1). The activity was re-proposed and approved in 2016 as Activity 2016-1.

f. **CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES**

There are challenges related to the benchmarks. Households enter and leave the program every year which affects the original benchmark. Increases in income are determined by several different variables (economy, job market, households participating, etc.), which in turn effect the amount of rent that households pay. Households may choose to pay a higher amount of rent if they wish to rent a unit larger than their voucher size, or a unit that is more expensive. Households are not required to report changes in income until their next regularly scheduled recertification provided their rent is based on a minimum of \$6,000 in income. One possible scenario is a family loses income, an interim is processed to include \$6,000 of TANF benefits and the family is then not required to report income changes until the next regularly scheduled recertification. The data is not “real-time” and could be almost two years old when metrics are determined for the annual report.

ACTIVITY 2016–2

a. **PLAN YEAR APPROVED, IMPLEMENTED, AMENDED**

Activity 2012–2, Rent Simplifications for Households who are Elderly and/or Persons with Disabilities, was approved and implemented in 2012. This activity was amended under Activity 2014–3. Both these activities were replaced with Activity 2016–2, which was approved and implemented in 2016. No further amendments have been made to this activity.

b. **DESCRIPTION/IMPACT/UPDATE**

This activity is a simplified rent structure for households who are elderly and/or persons with disabilities and includes these elements:

- rent based on 26.5% of gross income
- triennial recertification
- income disregard
- a limit on interim decreases
- flat fee of \$125 per ineligible family member per month

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

- December 31, 2013 – 57 households
- December 31, 2014 – 41 households
- December 31, 2015 – 25 households
- December 31, 2016 – 19 households
- December 31, 2017 – 16 households
- December 31, 2018 – 9 households
- December 31, 2019 – 6 households
- December 31, 2021 – 6 households
- December 31, 2022 – 4 households

Two households lost the hardship in 2022, both moved to a new unit which changed contract rent and utility allowance.

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|--|---|--|---|---------------------|
| CE #1 – Total cost of task in dollars (decrease) triennial recertification schedule | 2012: cost of \$46,332 (1,782 staff hours x \$26 per hour with an average of 3 hours per recertification) | \$15,290 (Reduce total number of recertifications to 198 or less than 606 hours) | \$16,380 (630 hours, 65% reduction) | No |
| CE #2 – Total time to complete the task in staff hours (decrease) triennial recertification schedule | 2012 total staff time of 1,782 (3 hours average per recertification x 594 annuals processed) | 588 hours (Reduction of hours in staff time of less than 66%) | 630 hours (210 recertifications, 65% reduction) | No |

| | | | | |
|---|--|----------------------------|--|---|
| CE #2 – Total time to complete the task in staff hours (decrease) elimination of medical deductions | In 2011, 232 households had medical deductions, average was 1 hour per recertification to calculate these deductions | Zero hours | 2012: Reduction in staff time of 232 hours, equals staff savings of \$6,032 = 232 x \$26 per hour) | This outcome was achieved in 2012, and BHP continues to realize savings due to elimination of medical deductions from the calculation |
| CE #3 – Average error rate in completing a task as a percentage (decrease) | 50% potential for errors calculating medical deductions | Decrease to zero potential | Zero (all deductions have been eliminated) | Yes |
| CE #5 – Tenant Rent Share in dollars (increase) | Average Public Housing: \$235 Average Housing Choice: \$274 | Zero increase | Public Housing: increase of \$181 (total \$416) Housing Choice: increase of \$68 (total \$342) | No |
| SS #1 – Increase in household income | \$11,616 Average household income at 12/31/13 | \$11,848 (Increase of 2%) | \$15,896 (increase of 37%) | Yes |

| | | | | |
|--|--|--|--|--|
| <p>SS #3 – Report the following separately for each category:</p> <ol style="list-style-type: none"> (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other | <p>65 total households employed (when this metric was written in 2012, it was not separated by category)</p> | <p>66 (Increase of 1% increase (when this metric was written in 2012, it was not separated by category))</p> | <p>Employed full time – 20; Employed part time – 20; Educational program – 0; Job training program – 0; Unemployed – 4; Others – 178 (main source of income is SS or SSDI based on population type)</p> | <p>No, there was a decrease in number of households that were employed, which makes sense based on the population being elderly and/or disabled households</p> |
| <p>SS #8 – Number of households transitioned to self-sufficiency (increase). Self-sufficiency defined as exiting program, moving into market rental or home ownership</p> | <p>Zero</p> | <p>Zero</p> | <p>Zero</p> | <p>This activity applies to households who are elderly and/or disabled and are not expected to obtain self sufficiency</p> |

c. ACTUAL NON-SIGNIFICANT CHANGES

There have not been any non-significant changes to this activity.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

Significant changes were made to the original activity 2012-2 under activities 2014-3 and 2016-2. All the elements of activities 2012-2 and 2014-3 are included in Activity 2016-2.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

There are several variables that go into the benchmarks. The benchmark for income was set in 2012 and does not account for inflation. With the triennial recertification cycle, we are not capturing any Cost-of-Living Adjustment that Social Security recipients receive on an annual basis. This delayed recalculation causes a higher-than-normal increase in the rent portion paid by the families at the time of recertification every three years (instead of experiencing a smaller increase year over year). The number of households who are elderly and/or persons with disabilities can fluctuate from year to year based on who enters the program through the lottery system. This activity was not designed to increase employment outcomes as the focus is on households with elderly and/or persons with disabilities and any employment income that can be earned is arbitrary.

ACTIVITY 2016–3

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2016-3 – Landing Landlords, was approved in 2016. One element (Moving Compliance) was implemented in 2016 and the other three elements were implemented in 2018. No amendments have been made to this activity.

b. DESCRIPTION/IMPACT/UPDATE

The goal of this activity was to increase participation by private landlords in the Housing Choice Voucher program. There are four elements to this activity:

- Landlord Incentive Payment/Signing Bonus
- Landlord Assurance Fund (formerly known as the Damage Claim Fund)
- Security Deposit Revolving Loan Fund
- Moving with Continued Assistance/Moving Compliance

Thirty-three new landlords began participation in 2022, for a total of \$6,600 paid in incentives.

In 2018, the Damage Claim Fund was expanded with our regional partners to include all voucher holders within Boulder County and renamed the Landlord Assurance Fund. There are four agencies within Boulder County that administer vouchers (Boulder Housing Partners, Boulder County Housing Authority, Longmont Housing Authority and Mental Health Partners – contract administrator for the Colorado Division of Housing vouchers). It is funded by Boulder County, the City of Boulder, the City of Longmont, and the Housing Authorities. In 2022, we did not receive any reimbursement requests.

In 2022, we received four applications for the Security Deposit Loan fund. One participant found a different source to pay the security deposit, the other three entered into a payback agreement. One participant who requested a loan in 2021 passed away in 2023 prior to repaying the debt. This will result in a charge to HAP in 2023.

The fourth element, Moving with Continued Assistance, was implemented in 2016. During 2022, we had 117 requests to move and 95 households were complying. Of these 95:

- 81 moved with a voucher (8 ported out of our jurisdiction)
- 10 cancelled their move
- 4 had not yet moved as of 12/31/22

Twenty-two households were asked to come into compliance prior to being able to move with continued assistance. Of these 22:

- 13 moved out
 - 4 with a voucher
 - 4 without a voucher
 - 5 were terminated from the program due to non-compliance
- 2 came into compliance but had not yet moved as of 12/31/22
- 7 did not move
 - 4 are still in place
 - 3 were terminated from the program due to non-compliance

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

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

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

The standard metric for this activity does not apply to Boulder, as all of Boulder’s neighborhoods are neighborhoods of opportunity.

ACTIVITY 2016–4

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2016-4, Bringing School Home Referral Process, was approved and implemented in 2016. There have been no amendments to this activity.

b. DESCRIPTION/IMPACT/UPDATE

Activity 2016-4, Bringing School Home Referral Process, is the first step in our bigger program, Bringing School Home, which is designed to positively disrupt factors working against the success of children. This activity allows us to bring families with children aged 0 to 5 into four of our sites where services are offered through the Bringing Home School Program. In 2022, 14 families entered the program. The families agree to accept services with the goal of children being kindergarten ready, succeed in school and eventually be self-sufficient.

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

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|---|----------|--|--------------------------------------|---------------------|
| SS #5 – Number of households receiving services aimed to increase self-sufficiency (increase) | Zero | 100% of all new admissions based on vacant units | 14 families (100% of new admissions) | Yes |

| | | | | |
|--|-----------|----------|------------------------------|-----|
| SS# 8 – Number of households transitioned to self-sufficiency (increase) | Zero | Zero | Zero | Yes |
| HC #3 – Average applicant time on wait list in months (decrease) | 24 months | 2 months | 2.9 months (87 days average) | No |
| HC #4 – Number of households at or below 80% AMI that would lose assistance or need to move (decrease). This activity targets families with children | Zero | Zero | Zero | Yes |
| HC #5 – Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase) | Zero | Zero | Zero | Yes |
| HC #7 – Number of households receiving services aimed to increase housing choice (increase) | Zero | Zero | Zero | Yes |

| | | | | |
|---|------|---------|---------|-----|
| CE #4 – Amount of funds leveraged in dollars (increase) | Zero | \$9,408 | \$9,408 | Yes |
|---|------|---------|---------|-----|

c. ACTUAL NON-SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

d. ACTUAL CHANGES TO METRICS/DATA COLLECTION

There have been no changes to the metrics or data collection methodology.

e. ACTUAL SIGNIFICANT CHANGES

There have been no changes made to the activity since it was approved and implemented.

f. CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES

The benchmark of two months wait time was an estimate created without historical data on our new process. The pandemic created difficulties in connecting with applicants and for them to be able to obtain the required documents, which increased the wait time. In late 2022, BHP decided to bring the Bringing School Home wait list back to the Housing Choice Voucher team. The preference is still in place for this program.

ACTIVITY 2018-1

a. PLAN YEAR APPROVED, IMPLEMENTED, AMENDED

Activity 2018-1 Project Based Waivers was a consolidation of all the previous project-base voucher waivers from activities 2012-1, 2014-6 and 2015-2 into one, and introduced three new elements. This activity was approved and implemented in 2018. No amendments have been made since combining the waivers into one activity.

b. DESCRIPTION/IMPACT/UPDATE

Since participating in the Moving to Work Demonstration Program, Boulder Housing Partners has implemented several activities related to the Project-Based Voucher rules. This activity includes the following elements:

- *Waive the 20% cap on project-based vouchers* – allows BHP to project base more than 20% of our voucher authority.
- *Definition of excepted units* – allows BHP to project base vouchers at 100% of the units in advance of offering services.

- *Waive the competitive bidding process* –waives this requirement when BHP is placing vouchers in a project owned by BHP.
- *Rent limits and rent reasonableness* – allows BHP to establish appropriate rent limits and conduct our own rent reasonableness tests for our project-based voucher contracts, using data gathered from market studies, Fair Market Rents, current market comparisons and average rents.
- *Allow owner/service partner to hold wait list* – allows the owner or the service partner at all project-based voucher sites to hold the wait list and refer participants to BHP’s Housing Choice Voucher Department.
- *Allow BHP staff to conduct Housing Quality Standards inspections at our PBV units* – allows in-house staff that has been certified in Housing Quality Standards to conduct inspections at BHP-owned properties.
- *Allow participants who are no longer receiving housing assistance payments to remain on the voucher* – allows families to stay on the voucher program even when their portion of rent is higher than the contract rent, which also allows them to be eligible for the next available voucher if assistance would allow them to live in the private market.
- *Allow participant families to continue to pay rent according to their income* – allows families to stay in place at a project-based voucher community and pay rent according to their income when it exceeds the contract rent that has been set under the contract.

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

At the end of 2022, we had five families who would have been graduated from the program and asked to move without rental assistance due to increases in income that allowed them to pay the entire contact rent. We had seven households who recertified in 2022 and were allowed to stay on the program without receiving any housing assistance. In 2022, under this change, 27 households stayed in place, continue to be eligible for the next available voucher and pay rent according to their income.

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|---|------------------------------------|-----------------|---------|---------------------|
| CE #1 – Total cost of task (decrease) elimination of competitive process | \$1,680 | Reduce to \$0 | Zero | Yes |
| CE #2 – Total time to complete the task in staff hours (decrease) elimination of competitive process | 40 hours | Zero | Zero | Yes |
| CE #1 – Total cost of task (decrease) average cost of an independent consultant to determine reasonable rent | \$6,000 | Reduce to \$130 | Zero | Yes |
| CE #2 – Total time to complete the task in staff hours (decrease) independent consultant to determine reasonable rent | 5 hours | Zero | Zero | Yes |
| CE #1 – Total cost of task (decrease) time to maintain wait list | \$2,340 (90 hours x \$26 per hour) | Zero | Zero | Yes |

| | | | | |
|---|-------------|-------------------------------|------------|-----|
| CE #2 – Total time to complete the task in staff hours (decrease) to maintain wait list | 90 hours | 67 hours (1 hour per move-in) | 67 hours | No |
| HC #1 – Number of new housing units made available for households at or below 80% AMI (increase) | Zero | Zero | Zero | Yes |
| HC #2 – Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase) | Zero | Zero | Zero | Yes |
| HC #3 – Average applicant time on wait list in months (decrease) | 31.5 months | 2 months | 6.7 months | No |
| HC #4 – Number of households at or below 80% AMI that would lose assistance or need to move (decrease). | Zero | Zero | Zero | Yes |

C. ACTUAL NON-SIGNIFICANT CHANGES

There have not been any non-significant changes to this activity.

d. **ACTUAL CHANGES TO METRICS/DATA COLLECTION**

The number of project-based vouchers has increased from 2012 when BHP entered the demonstration program and first implemented a waiver. In 2012, BHP had 89 project-based voucher units. We added 31 units in 2014; 279 units in 2015 with the conversion of the public housing units under RAD/Section 18; and 33 units in November 2020 with another public housing conversion under Section 18 disposition. In March 2021, we project-based 20 units at BHP’s newest development 30Pearl to serve households who have an intellectual and/or developmental disability. As of December 31, 2021, 452 vouchers are project based. We continue to monitor the metrics regarding wait time and applicant processing. In late 2022, we created the Project-Based Voucher Compliance team. This team will process all applications and recertifications for all the Project-Based Voucher units. The team was created as a pilot project in October 2022, with full implementation in 2023.

e. **ACTUAL SIGNIFICANT CHANGE**

This activity consolidated three previously approved activities into one, while adding three new elements to the activity in 2018.

f. **CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES**

We had 67 total move-ins this year which is more than anticipated when the benchmark was set. The number of Project-Based Voucher units has also increased significantly since this part of the activity was approved and implemented. The average time on the waiting list is higher than hoped for. Wait lists are managed by our service partner and/or owner. Some lists are opened for a few days at a time. In that time frame, 100 – 200 applicants apply. Service partners wait lists are open all the time, however, they are targeting a specific population that will benefit from the services that are being offered at those sites. In late 2022, wait list administration for the majority of project-based vouchers began to transition back to the Housing Choice Voucher team. This transition will be complete in 2023 and this part of the activity will be adjusted accordingly.

ACTIVITY 2020-1

g. **PLAN YEAR APPROVED, IMPLEMENTED, AMENDED**

Activity 2020-1 was proposed in our 2020 Plan and approved by HUD in 2020. This activity was fully implemented in 2021. The delay was due to the pandemic and having enough time to focus on software system upgrades for this to work properly.

h. DESCRIPTION/IMPACT/UPDATE

This activity changes the income and escrow calculations for families living at our Woodlands community and participating in the Family Self Sufficiency Program. Rent is calculated in the same manner as our work-able families under Activity 2016-1. The escrow calculation has two parts: escrow based on earned income and goals achieved.

Beginning in 2020, all new families admitted to the program have their rent and escrow calculated in this way. Existing families were grandfathered in and allowed the option to opt into the new rent and escrow calculations as of their June 2020 annual recertification. No families opted in during 2022. As of December 31, 022, there are four families that remain under the regular escrow and rent calculation. They are all set to graduate in 2023.

Ten families entered the program in 2022. Regularly scheduled recertifications are every two years. Escrow will be earned at the one-year anniversary of entering the program.

For families who entered the program in 2021, escrow based on goals achieved were awarded to one of the eight families who entered the program in 2021. Total escrow earned by these families was \$100. Only one family opted into the program in 2021 and no hardships was needed. This family also graduated from the FSS program in 2022.

For the seven families that were admitted to the program in 2020, five of them have earned income included in the rent calculation and are earning a monthly escrow deposit. One of them also completed their Year 2 goals and received an escrow deposit based on achieving that goal. Income for three of the households decreased since move-in (two years' prior). For four households, the income increased with an average of \$5,597.

| Metric | Baseline | Benchmark | Outcome | Benchmark achieved? |
|--|-------------------------------|-------------------------|--|---------------------|
| CE #1 - Total cost of task in dollars (decrease) biennial recerts and interims (based on extenuating circumstances only) | \$5,460 (210 x \$26 per hour) | \$3,276 (40% reduction) | \$2,145 (82.5 hours x \$26 per hour, reduction of 61%) | Yes |

| | | | | |
|--|--|--|--|---|
| CE #2 – Total time to complete the task in staff hours (decrease) | 210 (35 annuals x 3 hours per annual plus 70 interims x average of 1.5 hours per annual) | 126 (40% reduction) | 82.5 hours (17 annuals and 21 interims) | Yes |
| CE #5 – Total household contributions towards housing assistance (increase) | \$590 per household | \$632 (Increase of 7%, includes hardship upon transition if applicable) | \$548 | Yes |
| CE #6 – Average amount of HAP per household affected by this policy (decrease) | \$1,008 per household) | \$937 (Decrease of 7%, includes hardship upon transition if applicable) | \$1,156 (increase of 13%) | No |
| SS #1 – Average earned income of households affected by this policy in dollars (increase) | \$22,033 | \$22,474 (Increase of 2%) | \$21,957 (decrease of 0.3%) | No |
| SS #2 – Average amount of escrow of households affected by this policy in dollars (increase) | Average escrow upon graduation \$6,137 | \$11,137 (Increase of \$5,000 per household) | Zero | No families graduated under this escrow calculation in 2022 |
| SS #3 – Increase in positive employment status: Full time Part time Educational program Job training | Full time: 21 Part time: 9 Educational Program: unknown Job Trainee: unknown Unemployed: 3 | Full time: no increase; Part time: no increase; Educational Program: no change; Job Trainee: no change; | Full time: 7 Part time: 15 Educational Program: unknown Job Trainee: unknown Unemployed: 3 | No |

| | | | | |
|--|---|----------------------------|-----|--|
| Unemployed Other | | Unemployed: no decrease | | |
| SS #4 – Number of households receiving TANF (decrease) | 1 | None | 5 | No |
| SS #5 – Number of households receiving services aimed to increased self-sufficiency | 35 | 35 | 35 | Yes |
| SS #8 – Number of families moved to self- sufficiency. SS defined as exiting program and moving into market rental or homeownership | 2.4 families graduated without voucher assistance | 4 | N/A | Due to timing of program, no household has graduated as of 12/31/2022 |

i. **ACTUAL NON-SIGNIFICANT CHANGES**

There have not been any non-significant changes to this activity.

j. **ACTUAL CHANGES TO METRICS/DATA COLLECTION**

The baseline and benchmark have been updated for average HAP as contract rents at this project-based voucher property increased when the property converted to a tax credit property in late 2020.

k. **ACTUAL SIGNIFICANT CHANGE**

No changes have been made to this activity.

l. **CHALLENGES IN ACHIEVING BENCHMARKS AND POSSIBLE STRATEGIES**

Metrics only apply to those families who are on this rent and escrow calculation. Of the 35 units at Woodlands, there are four families that remain on the regular program (they have not chosen to opt into the program).

ACTIVITIES NOT YET IMPLEMENTED

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

ACTIVITIES ON HOLD

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

CLOSED OUT ACTIVITIES

ACTIVITY 2012–1

MTW Activity 2012–1, Allow BHP to Commit Project-Based Vouchers to cover 100% of the units at converted public housing developments was incorporated into MTW Activity 2018–1. The metrics have been included with MTW Activity 2018–1. This activity was approved in 2012 and implemented in 2015 with the conversion of public housing units to Housing Choice Vouchers. Metrics were reported in the Annual Reports for 2012 through 2017. This activity was closed out in 2018. Metrics for 2018 and future years are reported under Activity 2018–1.

ACTIVITY 2012–2

MTW Activity 2012–2, Rent Simplification for Elderly and Disabled Households was approved and implemented in 2012. It was amended under Activity 2014–3. Further changes were made to the rent reform in 2016 and all aspects of this activity were incorporated into Activity 2016–2, closing it out in 2016. Metrics were reported in the Annual Reports for 2012 and 2013. Metrics for 2014 and 2015 were reported under Activity 2014–3. Metrics from 2016 forward are included in Activity 2016–2.

ACTIVITY 2012–3

Activity 2012–3, Rent Simplification for Family Households, was approved and implemented in 2012 and closed out in 2016. All elements of this activity were incorporated into Activity 2016–1. Metrics for this activity were reported in the Annual Reports for 2012 through 2015. Metrics from 2016 forward are included in Activity 2016–1.

ACTIVITY 2012–7

MTW Activity 2012–7, Implement a Landlord Self-Certification System for HQS Inspections in the Voucher Program, was approved in 2012 but never implemented. The original activity would have placed a greater, undue burden on landlords. Therefore, the activity was re-written and approved in the 2013 MTW Annual Plan under Activity 2013–1 and allows the inspection cycle to follow the recertification schedule.

ACTIVITY 2014–1

MTW Activity 2014–1, Rent Reform for Housing Choice Work-able Families was implemented in 2014, and amended under Activity 2016–1. All aspects of the original activity were included in the 2016 Activity. This activity was approved and implemented in 2014 and closed out in 2016. Metrics were reported in the Annual Reports for 2014 and 2015. Metrics from 2016 forward are included under Activity 2016–1.

ACTIVITY 2014–2

MTW Activity 2014–2: Rent Reform for Public Housing Work-able Families was never implemented. With the conversion of six of the eight public housing sites (85% of the units) under Section 18 disposition and RAD in 2015, the households were transitioned to the voucher program. This activity was approved in 2014 and never implemented due the decrease in the number of work-able families in the public housing units, and the goal BHP has of converting the final 49 public housing units to the Housing Choice Voucher program.

ACTIVITY 2014–3

MTW Activity 2012–2, Rent Reform for Elderly and Disabled Households was added to under Activity 2014–3 Limit of One Interim Decrease Recertification per year for elderly households and persons with disabilities. Further changes were made to the rent reform in 2016 and all aspects of this activity were incorporated into Activity 2016–2. This activity was approved and implemented in 2014 and closed out in 2016. Metrics have been reported in Annual Reports for 2014 and 2015. Since 2016, metrics have been included in Activity 2016–2.

ACTIVITY 2014–4

MTW Activity 2014–4, Removed the Flat Rent Option for all Public Housing Households was approved and implemented in 2014. Between 2014 and 2020, BHP has disposed all but 15 units of public housing using the Rental Assistance Demonstration Program or Section 18. The population that the remaining 15 units serve very rarely use this option. The activity was closed out in 2021. Final metrics are included in 2021 report.

ACTIVITY 2014–5

Activity 2014–5 Changes the Mobility Options for Families who live at Woodlands, a project-based voucher community, and participate in the Family Self-Sufficiency (FSS) Program. This activity was approved and implemented in 2014. BHP made changes to the Admin Plan in 2021 which cancels out the focus of this activity. Final metrics for this activity are included in 2021 Annual Report. The activity was closed out in 2021.

ACTIVITY 2014–6

MTW Activity 2014–6, Rent Limits and Rent Reasonableness for Project-Based Vouchers was incorporated into MTW Activity 2018–1. This activity was approved and implemented in 2014 and closed out in 2018. Metrics were provided for this activity in Annual Reports for 2014–2017. Current metrics have been included with MTW Activity 2018–1.

ACTIVITY 2015-2

MTW Activity 2015–2, Project-Based Voucher Applicant Process was incorporated into MTW Activity 2018–1. This activity was approved in 2015, implemented in 2015 and closed out in 2018. Metrics were provided for this activity in the Annual Reports for 2015, 2016 and 2017. Current year metrics are included with Activity 2018–1.

V. PLANNED APPLICATION OF MTW FUNDS

A. FINANCIAL REPORTING

i. Available MTW Funds in the Plan Year

The MTW PHA shall submit unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA), or its successor system.

ii. Expenditures of MTW Funds in the Plan Year

The MTW PHA shall submit unaudited and audited information in the prescribed FDS format through the FASPHA, or its successor system.

iii. Describe Application of MTW Funding Flexibility

The MTW PHA shall provide a thorough narrative of actual activities that use only the MTW funding flexibility. Where possible, the MTW PHA may provide metrics to track the outcomes of these programs and/or activities. Activities that use other MTW authorizations in Attachment C and/or D of the Standard MTW Agreement (or analogous section in a successor MTW Agreement) do not need to be described here, as they are already found in Section (IV) of the Annual MTW Report. The MTW PHA shall also provide a thorough description of how it used MTW funding flexibility to direct funding towards specific housing and/or service programs and/or other MTW activity, as included in an approved MTW Plan.

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|--|
| APPLICATION OF “MTW FUNDING” FLEXIBILITY |
| Activity 2013-4 allows for the use of Replacement Housing Factor Funds for other affordable housing. Activity 2015-1 allows for MTW funds to be used on other local, non-traditional affordable housing. |

B. LOCAL ASSET MANGEMENT PLAN

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

Yes

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

No

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

No

iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.

N/A

VI. ADMINISTRATIVE

A. REVIEWS, AUDITS, AND INSPECTIONS

In 2022, no audits or inspections were conducted.

B. EVALUATION RESULTS

BHP worked in partnership with the University of Colorado (CU) to develop the rent-controlled study to evaluate the effects of the flat tier rent reform structure that was implemented in 2014. Due to the size of our work-able family group, it was not feasible to compare a control group to a treatment group. Instead, households were compared against themselves over time to ascertain if changes occurred and if so, if they could be attributed to the interventions put in place through the MTW Program. The baseline surveys were conducted in 2014 and the final survey was conducted in 2018. Information about the evaluation can be found in the 2014 – 2018 Annual Reports. Currently, there are no active evaluations outside of annual monitoring of all MTW Activities.

C. MTW STATUTORY REQUIREMENT CERTIFICATION

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

- Ensuring that at least 75% of households assisted are very low-income;
- Continuing to assist substantially the same total number of households as would have been assisted had we not participated in the MTW demonstration; and
- Maintaining a comparable mix of households (by family size) served as would have been served had we not participated in the MTW demonstration.

D. MTW ENERGY PERFORMANCE CONTRACT (EPC) FLEXIBILITY DATA

Boulder Housing Partners does not possess flexibility regarding Energy Performance Contracts.