



Moving to Work

2017 Annual Report



March 31, 2018

Seattle Housing Authority

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I. Introduction

This section provides an overview of the purpose and layout of the report and describes Seattle Housing Authority's short-term and long-term goals.

What is “Moving to Work”?

Moving to Work (MTW) is a U.S. Department of Housing and Urban Development (HUD) demonstration program for housing authorities to design and test innovative, locally designed housing and self-sufficiency initiatives. The MTW program allows participating agencies to waive certain statutes and HUD regulations in order to increase housing choice for low-income families, encourage households to increase their self-sufficiency, and improve operational cost effectiveness. Seattle Housing Authority's participation in the MTW program allows the agency to test new methods to improve housing services and to better meet local needs.

Fiscal year 2017 marked Seattle Housing Authority's nineteenth year as a MTW agency. Each year, Seattle Housing Authority adopts a plan that highlights MTW initiatives and other activities planned for the following fiscal year. At the end of the year, the agency creates the annual report to describe the year's accomplishments.

What is in this report?

The annual report describes Seattle Housing Authority's MTW activities and performance in 2017 and provides comparisons to projections in the 2017 Annual Plan. The report follows the required outline established in Attachment B of the agency's MTW agreement with HUD:

Section I: Introduction provides an overview of Seattle Housing Authority's goals and objectives for 2017.

Section II: General Housing Authority Operating Information reports on housing stock, leasing, and waiting lists.

Section III: Proposed MTW Activities is included and left blank at HUD's direction. The activities proposed in the 2017 MTW Plan are reported on in Section IV as approved activities.

Section IV: Approved MTW Activities provides information on previously approved uses of MTW authority, including evaluation data and standard metrics regarding the effectiveness of different MTW activities.

Section V: Sources and Uses compares projected and actual revenue and expenses for 2017.

Section VI: Administrative Information provides administrative information required by HUD.

Not all of Seattle Housing Authority's activities and programs are part of the MTW program. However, due to federal requirements about this report's content and format, this document focuses on MTW

activities. For more information about all of Seattle Housing Authority's programs, please see our website (www.seattlehousing.org) for agency-wide annual reports and our strategic plan.

MTW Goals and Objectives

2017 was an important year for Seattle Housing Authority in many ways. The 2017 Annual Plan set MTW priorities for the year focused on operational efficiency, supports and connections for self-sufficiency, and providing choice in housing and its location. Progress on these priorities is reflected throughout this report.

Long-Term MTW Goals

Aligned with MTW program goals and agency goals, Seattle Housing Authority has focused on maximizing the agency's efficiency, including both MTW strategies and LEAN processes with our Housing Operations and Housing Choice Voucher staff. The MTW program review underway has also helped us explore how we can best support households in pursuing self-sufficiency, including developing a new structure for incentives and participation in our FSS program. We are also assessing the strategies that are most effective in promoting housing choice, including participation in the Creating Moves to Opportunity pilot program for families with children. These efforts to continue to improve the effectiveness of our MTW strategies are particularly important given the current context of instability in funding for affordable housing and other supports for the households that we serve, including health care, food security, employment and training services, and more.

Seattle Housing Authority and MTW agencies nationwide have also continued to advocate with HUD for improvements in planning, reporting, and performance metrics that will more effectively capture the successes and lessons learned through participation in the MTW program. This work includes performance measurement initiatives funded by MTW housing authorities through the HAI Group and Abt Associates. We hope that these efforts will support HUD's improvement of metrics and will continue to support local and national evaluation initiatives to better understand the impacts of MTW activities.



II. General Housing Authority Operating Information

This section provides an overview of Seattle Housing Authority's housing portfolio, leasing, and waiting list information.

Mission statement

The mission of the Seattle Housing Authority is to enhance the Seattle community by creating and sustaining decent, safe and affordable living environments that foster stability and self-sufficiency for people with low incomes.

Agency overview

Seattle Housing Authority is a public corporation, providing affordable housing to more than 34,000 people, including more than 29,000 in neighborhoods throughout the city of Seattle. Seattle Housing Authority (SHA) operates a variety of programs that include agency operated housing, partner operated communities, and private rental housing.

Participants in Seattle include approximately 9,000 children, 9,000 people with disabilities, and 6,000 elderly (disabled and non-disabled) individuals. At the end of 2017 82 percent of households had annual incomes below 30 percent of Area Median Income (AMI). Households' average income in 2017 was \$16,080.

In keeping with our mission, Seattle Housing Authority supports a wide range of community services for residents, including employment services, case management, and youth activities.

Funding for the agency's activities comes from multiple sources including the HUD MTW Block Grant, special purpose HUD funds, other government grants, tenant rents, and revenues from other activities.

Housing stock: MTW Block Grant funded housing

The majority of Seattle Housing Authority's funding from HUD comes in the form of a block grant that combines the public housing operating fund, public housing capital fund, and MTW voucher funding into one funding source for Seattle Housing Authority to use to pursue its mission.

The following section focuses on Seattle Housing Authority's MTW-funded inventory. For information on all of Seattle Housing Authority's housing stock, regardless of funding type, see Appendix A.

Public housing units

The Low Income Public Housing program (also referred to as public housing or LIPH) included 6,033 units as of year-end 2017. Public housing units are in high-rises (large apartment buildings), scattered sites (small apartment buildings and single family homes), and in communities at NewHolly, Lake City Court, Rainier Vista, High Point, and remaining original units in Yesler Terrace. HUD's MTW Block Grant provides funding to help pay for operating costs exceeding rental income. Households typically pay approximately 30 percent of their monthly income for rent and utilities. About 100 of these public housing units are utilized by service providers who provide transitional housing or services to residents. About 900 public housing units are part of the Seattle Senior Housing Program (further described in the following Local Housing section). Forty units receiving public housing subsidy through Seattle Housing Authority are owned by nonprofits and operated as traditional public housing.

Housing Choice Vouchers

The Housing Choice Voucher program is also commonly known as HCV or Section 8. The program is a public/private partnership that provides vouchers (housing subsidies) to low-income families for use in the private rental housing market. **At year end 2017, Seattle Housing Authority administered 9,740 vouchers funded through HUD's MTW Block Grant.**

Participants typically pay 30 to 40 percent of their household's monthly income for rent and utilities, depending on the unit that they choose. Voucher subsidies are provided through a variety of means including:

- Tenant-based (tenants can take their vouchers into the private rental market)
- Project-based (the subsidy stays with the unit, property, or defined set of properties)
- Program-based (MTW flexibility allows Seattle Housing Authority to provide unit-based subsidies that float within a group of units or properties)
- Provider-based (Seattle Housing Authority uses MTW flexibility to distribute subsidies through service providers so that they can master lease units and sublet to participants in need of highly-supportive housing)
- Agency-based (tenant-based vouchers distributed through selected partners)

Project-based Vouchers

In 2017 Seattle Housing Authority awarded 168 MTW project-based vouchers, as well as 37 Veterans Affairs Supportive Housing (VASH) vouchers and 36 Rental Assistance Demonstration (RAD) vouchers. MTW project-based vouchers supported replacement housing units for Yesler Terrace redevelopment and homeless housing through the King County Combined Funders allocation. The following table shows new MTW project-based based vouchers. For more information about all of the programs supported with new project-based vouchers, please see Appendix B.

New MTW Housing Choice Vouchers that were Project-Based During the Fiscal Year			
Property Name	Anticipated Number of New Vouchers to be Project-Based	Actual Number of New Vouchers that were Project-Based	Description of Project
Hoa Mai Gardens	70	70	Replacement housing for Yesler redevelopment
Seattle Housing Authority Special Portfolio Single Family Dwelling	0	1	Six bedroom unit for a large family in SHA's Special Portfolio
Plymouth on First Hill and Pioneer Human Services	80	97	Homeless housing through the King County Combined Funders Allocation
Total Number of New Project-Based Vouchers	150	168	

	Anticipated	Actual
Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year	3,658	3,691
Total Number of Project-Based Vouchers Leased up or Issued to a Potential Tenant at the End of the Fiscal Year	3,475	3,362

Other Changes to the Housing Stock that Occurred During the Fiscal Year
Building B at Lam Bow Apartments was demolished due to a large building-wide fire.
Units were offline for various reasons throughout the year, including one at Michaelson Manor for construction; 16 at Jefferson Terrace for water damage and for UFAS conversion; one at Olive Ridge for roof damage; one at Lictonwood due to a fire; 6 at Tri Court for UFAS conversion; one at NewHolly for fire rehabilitation; and 23 in the Scattered Site portfolio for conversion, fire rehabilitation, and water intrusion.

Housing stock: Other (non-MTW) housing

Seattle Housing Authority also administers units and vouchers that are funded through sources other than the MTW Block Grant.

Special Purpose Vouchers

Seattle Housing Authority administers vouchers for special purposes (781 as of year-end) such as housing veterans and reunited families. These vouchers are often awarded competitively and funding is provided outside of the MTW Block Grant.

Section 8 New Construction

The agency has 130 locally-owned units that receive Section 8 New Construction funding. They serve people with extremely low incomes.

Moderate Rehab

Seattle Housing Authority administers HUD Section 8 Moderate Rehab funding for 648 units operated by partner nonprofits serving extremely low-income individuals.

Locally funded housing

Other affordable housing programs are operated outside of HUD's MTW Block Grant. They receive no operating subsidy except project-based vouchers in selected properties. Seattle Housing Authority may use MTW Block Grant funds for capital improvements in other affordable housing properties serving low-income residents (as discussed further in Section IV, MTW Activity 20.A.01). Seattle Housing Authority's locally funded affordable housing portfolio is not equivalent to HUD's local non-traditional category, but there is some overlap between the two categories, including tax credit units in HOPE VI communities.

Senior Housing

The Seattle Senior Housing Program (SSHP) was established by a 1981 Seattle bond issue. It includes 23 apartment buildings throughout the city, totaling over 1,000 units affordable to low-income elderly and disabled residents. In 2011 the agency added public housing subsidy to 894 of these units in order to keep rents affordable while addressing needed capital repairs. The agency used MTW authority to maintain the SSHP program's unique rules and procedures despite the introduction of public housing subsidy.

Remaining in the Seattle Senior Housing Program (as of year-end 2017) are 136 units without public housing subsidy.

Tax Credit and Other Housing Types

Seattle Housing Authority operates over 2,000 units of other types of housing, including locally subsidized housing and unsubsidized housing. Units are located in townhomes and small apartment

complexes throughout Seattle, including low- and moderate-income rental housing in the agency's redeveloped family communities (NewHolly, Rainier Vista, and High Point). These units do not receive ongoing operating subsidy, with the exception of project-based housing choice vouchers in selected units.

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End		
Housing Program	Total Units	Overview of the Program
Tax Credit	1,214	Straight tax credit units typically targeted to serve between 50% and 60% AMI without unit-based MTW subsidy
Locally Funded	656	Units targeted to serve between 50% and 80% AMI. May have housing choice vouchers or no subsidies. Some units are leased to agencies that provide transitional housing.
Market Rate	359	Units with no income restrictions
Non-MTW HUD Funded	130	SHA owned units that receive Section 8 New Construction funding
Total Other Housing Owned and/or Managed	2,359	

Major capital activities

MTW Block Grant funds

Seattle Housing Authority made progress on a number of capital projects in public housing communities in 2017, including elevators, exteriors, and roof rehabilitation and repair, as well as upgrades to security systems and accessibility upgrades in common areas for several properties. In addition, the agency made substantial progress on the redevelopment of Yesler Terrace, a Choice Neighborhoods project. See the following table for additional information.

Seattle Housing Authority installed new security systems at six Seattle Senior Housing Program buildings in 2017. More security system improvements are planned for 2018.

General Description of Actual Capital Fund Expenditures During the Plan Year

In 2017 Seattle Housing addressed roofs, elevators, security, interior upgrades, and exteriors at several properties in addition to other capital projects.

Elevators: SHA completed design work for elevators at Bitter Lake Manor (WA001000095) and Blakeley Manor (WA001000095). Elevator upgrades were completed at Colombia Place (WA001000093), Reunion House (WA001000095), and the first of two elevator rehabilitations began at Jefferson Terrace (WA001000009).

Generators: The generator replacement at Jefferson Terrace (WA001000009) was nearly completed.

Exteriors: Exterior rehabilitation in 2017 included roof replacement at Michaelson Manor (WA001000094). Exterior rehabilitation also began at Carroll Terrace (WA001000094).

Roofs: Roof replacement was completed at Blakeley Manor (WA001000095) and Pinehurst Court (WA001000092) as well as various scattered site locations (WA001000050 through WA001000057).

Security: ACAM systems have been installed at Bitter Lake (WA001000095), Columbia Place (WA001000093), Gideon Matthews Gardens (WA001000094), South Park Manor, Reunion House (WA001000095), and Pinehurst Court (WA001000092). SHA completed design of ACAM and security improvements at the remaining sixteen SSHP buildings, with designs out to bid in early 2018.

Pull Cords : Pull cords were removed at all SSHP buildings

Accessibility: Uniform Federal Accessibility Standard (UFAS) upgrades were scheduled for common areas in selected SSHP buildings in a first phase of work anticipated to extend throughout the portfolio. UFAS upgrades were completed in 10 units at Jefferson Terrace (WA001000009) and 4 units at Tri-Court (WA001000031).

Interior upgrades: Interior upgrades were completed in 12 scattered site locations (WA001000050 through WA001000057) as the first phase of unit upgrades to single family units in the portfolio.

Other capital projects: SHA completed various small capital projects at scattered sites buildings, including window replacement, siding repair and replacement, exterior painting, appliances, flooring, cabinet replacement, door repair and replacement, and window furnishings.

Leasing information

Leasing rates were strong in 2017. Seattle Housing Authority served more than 17,000 households as of year-end, including more than **5,700 households in public housing, as well as 9,100 households with MTW HCV vouchers and 700 households with special purpose vouchers**. SHA served an additional 2,000 households through other housing programs such as Section 8 Mod Rehab and Low Income Housing Tax Credit housing.

The following section focuses on “local non-traditional” households, a small subset of Seattle Housing Authority households that are served at least partially with MTW Block Grant funding but in a format different from the traditional public housing and Housing Choice Voucher programs. These households include, for example, people housed in programs operated by our community partners and the medical respite program. To learn more about leasing for all of Seattle Housing Authority’s programs, please see Appendix A.

Please note that the following table requires that we calculate total households served based on unit months served divided by twelve rather than providing an actual number of households served. Therefore these numbers do not correlate with the actual numbers of households served throughout the year or at year end. In addition there are differences between planned and actual numbers of households served.

Actual Number of Households Served at the End of the Fiscal Year		
Housing Program	Number of Households Served	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs	442	478
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs	1	0
Port-In Vouchers (not absorbed)*	N/A	286
Total Projected and Actual Households Served	443	764
Housing Program	Unit Months Occupied/Leased	
	Planned	Actual
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs	5,304	5,734
Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs	6	0
Port-In Vouchers (not absorbed)*	N/A	3,430
Total Projected and Annual Unit Months Occupied/Leased	5,310	9,164

*Excludes VASH vouchers; not projected in the MTW Plan

	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	N/A	0

Leasing issues

Across Seattle Housing Authority's portfolios, 2017 was a successful year. The competitive local rental market posed a substantial challenge for the Housing Choice Voucher program, but Seattle Housing Authority was effective in employing strategies that increased leasing rates, as described in the following table.

Description of Any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Year End	
Housing Program	Description of Leasing Issues and Solutions
Public Housing	Overall public housing leasing rates were strong. Challenges included two bedroom units in the SSHP program and UFAS units at Ross Manor, as well as delays in leasing for scattered sites units as the portfolio tried to find the best match between household and bedroom sizes.
Housing Choice Vouchers	Seattle continues to experience an extremely competitive rental market. However Seattle Housing Authority has successfully employed several tactics to assist participants in leasing with their vouchers, including initiatives that have increased SHA's speed in processing Request for Tenancy Approvals and other documents, as well as calling households on the lottery waiting list simultaneously when sending new admissions packets to reduce the number of returned mail and no responses when identifying customers for lease up.
Local Non-Traditional	Leasing rates for local non-traditional units remained strong in 2017.

Compliance with MTW statutory requirements

MTW housing authorities are required to comply with a few key requirements: that they assist substantially the same number of households as would have been served without MTW participation, continue to serve mainly very low-income households, and maintain a comparable mix of households served by family size. Seattle Housing Authority continues to meet these requirements.

The following table shows the distribution of households served in local non-traditional programs by income category. These households represent only a small portion of the total households served by Seattle Housing Authority; however, they are called out alone here because HUD uses data submitted to their standard information systems to verify compliance for public housing and HCV recipients. Seattle Housing Authority estimates that the overall percentage of MTW households served that were very low-income at year end was 96 percent.

Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-Income (Household Income for Local Non-Traditional Households Only)								
Fiscal Year	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	264	374	321	368	488	606	773	X
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	181	307	228	273	342	530	577	X
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	69%	82%	71%	74%	82%	87%	75%	X

The following table looks at the current and historical number of households served by family size, to verify that Seattle Housing Authority is serving a comparable mix of households.

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix of Family Sizes Served					
Baseline for the Mix of Family Sizes Served					
Family Size	Occupied Number of Public Housing units by Household Size when PHA Entered MTW	Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW	Non-MTW Adjustments to the Distribution of Household Sizes *	Baseline Number of Household Sizes to be Maintained	Baseline Percentages of Family Sizes to be Maintained
1 Person	3,317	1,535	785	5,637	51%
2 Person	967	1,041	79	2,087	19%
3 Person	590	824	0	1,414	13%
4 Person	423	529	0	952	9%
5 Person	223	259	0	482	4%
6+ Person	203	207	0	410	4%
Total	5,723	4,395	864	10,982	100%
Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized	<p>2011: SHA added 894 units from its Seattle Senior Housing Portfolio. Using average occupancy information for the most recent three years, the baseline was adjusted to show an increase of 785 1 Person Households and 79 2 Person Households. Other Historical Adjustments: Since beginning its MTW participation in 1999, SHA has done significant asset repositioning and made numerous non-MTW policy changes (such as occupancy standards); in addition the demographics and availability of other housing resources in Seattle community has changed. As there is not necessarily a direct relationship in unit and policy changes and household size, SHA reserves the right to make further historical adjustments in future reports. Data issues: A little over 100 households are not included in the 1998 numbers due to missing historical data for a portion of Holly Park which was undergoing redevelopment at that time.</p>				

Mix of Family Sizes Served							
	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Total
Baseline Percentages of Household Sizes to be Maintained	51%	19%	13%	9%	4%	4%	100%
Number of Households Served by Family Size this Fiscal Year	8,763	2,327	1,291	972	596	828	14,777
Percentages of Households Served by Household Size this Fiscal Year	59%	16%	9%	7%	4%	6%	100%
Percentage Change	16%	-17%	-33%	-27%	1%	40%	
Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages	Seattle Housing Authority has undertaken significant asset repositioning since 1998. While there is not a one for one relationship between unit size and household size, the changes in household sizes served largely reflects the changes in public housing unit sizes. Our tenant-based housing choice voucher program does not consider household size when pulling families off of the waiting list and is, therefore, subject to changes outside of SHA's control such as community demographics. In addition, our allocation of project-based vouchers to support service-enriched housing locally has increased the number of one person households due to a community focus on serving homeless households.						

Households transitioned to self sufficiency

Seattle Housing Authority strives to support participants in multiple ways as they transition to self-sufficiency. For different households, self-sufficiency may have different meanings. For the purpose of reporting within this report, Seattle Housing Authority has provided two metrics: households whose primary source of income is wages and households who transition to unsubsidized housing.

Number of Households Transitioned to Self-Sufficiency by Fiscal Year End		
MTW Activity #5: Local Leases	542	Households whose primary source of income was wages
MTW Activity #8: Special Purpose Housing Use	40	Households who transitioned to unsubsidized housing
MTW Activity #10: Local Rent Policy	1,382	Households whose primary source of income was wages
MTW Activity #13: Homeownership and Graduation from Subsidy	69	Households who transitioned to unsubsidized housing
Households Duplicated Across Activities/Definitions	528	
Annual Total Number of Households Transitioned to Self-Sufficiency	1,505	

Waiting list information

Waiting list strategies

Seattle Housing Authority's waiting list strategies vary to match the needs of different properties and housing programs. Applicants may be, and often are, on multiple waiting lists at the same time. For more information about the characteristics of households on the waiting lists, please see Appendix C.

Tenant-based housing choice vouchers

A single tenant-based voucher waiting list is maintained by Seattle Housing Authority for MTW-funded Housing Choice Vouchers. In February the housing authority held a lottery to establish a new waiting list and it remained closed subsequently. At year-end 3,098 households were on the waiting list.

Other housing choice vouchers

Partners maintain unique waiting lists for voucher subsidy in the project-based, program-based, provider-based, and agency-based voucher programs.

Seattle Housing Authority-operated housing

Site-specific waiting lists are offered for all of Seattle Housing Authority's affordable housing properties. The waiting lists for senior housing and public housing are purged on an ongoing basis through the use of Save My Spot, a system that allows applicants to check in monthly by phone or computer to indicate their continued interest in housing opportunities with Seattle Housing Authority.

Please see the following table for more information about waiting lists for Seattle Housing Authority's units and vouchers.

Wait List Information at Fiscal Year End				
Housing Program	Wait List Type	Number of Households on Wait List	Wait List Open, Partially Open or Closed	Was the Wait List Opened During the Fiscal Year
Federal MTW Public Housing Units (SHA Administered)	Site-Based	7,183	Open	N/A
Federal MTW Housing Choice Voucher Program (Tenant Based)	Community-Wide	3,098	Closed	Yes
Federal MTW Housing Choice Voucher Program (Project Based)*	Site-Based	2,163	Partially Open	N/A
Project-Based Local, Non-Traditional MTW Housing Assistance Program**	Site-Based	819	Partially Open	N/A

* Not an unduplicated count

** May include overlap with Housing Choice Voucher waiting list

For the Project-Based Federal MTW Housing Choice Program, the wait list was open for units at Bellevue/Olive Apartments, Casa Pacifica Apartments, Cascade Court Apartments, Cate Apartments, Colonial Gardens, David Colwell Building, Emerald City Commons, Hoa Mai Gardens, Julie Gardens, Kebero Court, Lakeview Apartments, Lincoln Apartments, Longfellow Creek, Mercer Court, Oleta Apartments, Park Place, Parker Apartments, Raven Terrace, and SHA Special Portfolio.

Four local non-traditional programs have waiting lists: units at Ravenna School Apartments, South Park Manor, Villa Park, and Longfellow Creek Apartments (categorized under Local Non-Traditional MTW Housing Assistance Program). Community agencies operating local non-traditional programs within public housing units have transitioned to coordinated entry through the county-wide system rather than maintaining their own waiting lists. Other units are also included under Local Non-Traditional MTW Housing Assistance, but do not maintain a waiting list, including straight tax credit units at Alder Crest Apartments and Seattle Housing Authority's HOPE VI communities.



III. Proposed MTW Activities: HUD approval requested

All proposed activities that are granted approval by HUD are reported on in Section IV as “Approved Activities.”



IV. Ongoing MTW Activities: HUD approval previously granted

This section provides information on previously HUD-approved uses of MTW authority, including evaluation criteria and specific waivers used.

Background

Seattle Housing Authority has made every effort to include all previously approved MTW activities in this section of the report. Any omissions are unintentional and should be considered continuously approved. It should be noted that during the initial years of the MTW program, HUD requirements regarding how and when to seek approval for MTW activities differed. Some MTW flexibilities were requested outside of the annual plan or were considered implicit as part of participation in the MTW program. In some cases, Seattle Housing Authority needed only to state in very broad terms its intention to implement an MTW activity. In many cases, MTW activities appeared in multiple plans. The dates included in this section represent the first year the activity was mentioned in an approved plan and the first year the activity was implemented.

Each MTW activity represents an authorization previously approved by HUD. The implementation of these activities may vary over time as Seattle Housing Authority strives to continuously improve its practices and respond to a changing environment. For the sake of the demonstration, we attempt to specify the strategies that are utilized. However, these strategies are part of a whole and cannot always be viewed as distinct parts.

The metrics provided in this section follow a format required by HUD.

Implemented MTW Activities

Please note that activities are generally numbered in chronological order. Some activities have been closed out and are listed in a separate section.

MTW Activity #1 – Development Simplification

Status

Active - First included in the 1999 MTW Agreement and 1999 MTW Annual Plan. First implemented in 2004.

Description

Development simplification helps Seattle Housing Authority to move quickly to acquire, finance, develop, and remove public housing properties from its stock in an efficient, market-driven manner. MTW flexibilities allow the agency to respond to local market conditions and avoid delays and associated costs incurred as a consequence of HUD requirements and approval processes. While of greatest impact when the housing market is highly competitive, these strategies present opportunities

continuously for Seattle Housing Authority to avoid costs and increase housing options as circumstances arise.

Authorization

MTW Agreement - Attachment C (C)(12), (C)(13), (C)(16); Attachment D (C)(2). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Public Housing Development Simplification Strategies

- Streamlined public housing acquisitions: Acquire properties for public housing without prior HUD approval, provided that HUD site selection criteria are met. (MTW Strategy #1.P.02. First implemented in 2004.)

Not Needed in 2017

- Design guidelines: Seattle Housing Authority may establish reasonable, modest design guidelines, unit size guidelines and unit amenity guidelines for development and redevelopment activities. (MTW Strategy #1.P.01. The agency has not yet needed to exercise this flexibility.)
- Total development cost limits: Replaces HUD's Total Development Cost limits with reasonable limits that reflect the local market place for quality construction. (MTW Strategy #1.P.03. The agency has not yet needed to exercise this flexibility.)
- Local blended subsidy: Seattle Housing Authority may blend public housing and Housing Choice Voucher funds to subsidize units that serve households earning below 80 percent of Area Median Income. (MTW Strategy #1.P.06. The agency has not yet needed to exercise this flexibility.)

Inactive

- Streamlined mixed-finance closings: Utilize a streamlined process for mixed-finance closings. (MTW Strategy #1.P.04. Implemented in 2005, but replaced by HUD's streamlined process published in 2013 in the final capital fund rule.)
- Streamlined public housing demo/dispo process: Utilize a streamlined demolition/disposition protocol negotiated with the Special Applications Center for various public housing dispositions (including those for vacant land at HOPE VI sites and scattered sites property sales). (MTW Strategy #1.P.05. Implemented in 2004, however, most of the streamlined features are now available to all housing authorities.)

Impact

Development simplification strategies are intended to promote housing choice by allowing Seattle Housing Authority to acquire, finance, develop, and remove property in a manner that maximizes our ability to take advantage of market conditions and provide affordable housing throughout the city of Seattle.

This activity is on schedule.

Impact	Metric	Baseline (2003)	Benchmark	2017 Results	Benchmark Achieved?
Housing Choice	HC1: Number of new housing units made available for households at or below 80% AMI as a result of SHA's MTW development strategies	0	400 cumulative	0 cumulative	No
	HC2: Number of housing units preserved for households at or below 80% AMI as a result of SHA's MTW acquisitions strategies	0	200 cumulative	1,085 cumulative	Yes

Seattle Housing Authority did not achieve the benchmark for MTW development strategies in 2017 because the agency did not develop new public housing units during the year. Failure to achieve the benchmark in this case reflects Seattle Housing Authority's schedule for new projects, which are largely dependent on the availability of financing, the real estate market, and community priorities. Performance against these benchmarks reflects neither positively nor negatively on MTW development strategies.

Revisions to benchmarks or metrics

No revisions were made.

Data collection methods

Seattle Housing Authority closely tracks all details regarding housing development, including the number of units developed and acquired.

No changes were made to data collection methods in 2017.

Seattle Housing Authority has preserved more than 1,000 affordable housing units using MTW strategies.

MTW Activity #3 - Inspection Protocol

Status

Active - First included in the 1999 MTW Annual Plan. First implemented in 2001.

Description

Seattle Housing Authority uses a cost-benefit approach to unit and property inspections. Current strategies in this approach include using Seattle Housing Authority's own staff to complete HQS inspection of its properties with vouchers and inspecting residences on a less frequent schedule.

Authorization

MTW Agreement- Attachment C (C)(9)(a), (D)(5), (D)(7)(a); Attachment D (D)(1); specific regulations waived include 24 CFR 982.405 (a), 982.352(b)(iv)(A), 983.59, 983.103(f). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-wide Inspection Protocol Strategies

- Reduced frequency of inspections: Cost-benefit approach to housing inspections allows Seattle Housing Authority to establish local inspection protocol, including less frequent inspections for residents who have not moved and interchangeable use of HQS and UPCS. (MTW Strategy #3.A.03. Implemented in 2003 for public housing. Implemented in 2013 for Housing Choice Vouchers, but MTW is no longer required for reduced HCV inspections due to the inclusion of biennial inspections in the 2014 Appropriations Act.)

Under development

- Private sector cost benefit and risk management approaches to inspections such as avoiding duplicative inspections by using other recent inspections for agencies such as the Washington State Housing Finance Commission. (MTW Strategy #3.A.01. Implementation planned for 2019.)

Voucher Inspection Protocol Strategies

- Inspect Seattle Housing Authority-owned properties: Seattle Housing Authority staff, rather than a third party entity, complete inspections of Seattle Housing Authority owned properties with vouchers. (MTW Strategy #3.H.01. Implemented in 2001.)

Inactive

- Fines for no-shows at inspections (MTW Strategy #3.H.02. Not yet implemented.)
- Self-certification for minor fails: Self-certification by landlords of correction of minor failed inspection items. (MTW Strategy #3.H.04. Implemented in 2010. This policy remains active, however we believe that MTW authority is not required and it is therefore listed as inactive from a MTW perspective.)

Inspection strategies that are unique to the project-based program are listed under MTW Activity #9 – Project-Based Program.

Impact

MTW inspection protocol strategies are intended to increase cost effectiveness by saving staff time through less frequent inspections and by inspecting Seattle Housing Authority's own units rather than contracting this work, with a goal of no negative impact on the quality of housing.

This activity is on schedule.

Impact	Metric	Baseline (2000)	Benchmark	2017 Results	Benchmark Achieved?
Cost Effectiveness	CE1: Total cost of inspections	\$429,647 in wages	\$627,478 or less in wages adjusted for CPI	\$481,021 in wages	Yes
	CE2: Total time to complete inspections in staff hours	18,720 (9 FTE)	16,640 (8 FTE) or less	14,560 (7 FTE)	Yes
	Staff time saved from avoided inspections	0	500 hours saved annually	281 hours saved (561 public housing inspections avoided)	No
Maintain housing quality	Voucher participant-requested inspections per leased vouchers	1.8 percent in 2009 (128 inspections were requested out of 6,997 households)	No increase in complaint inspection requests	<1 percent (34 inspections were requested)	Yes
	Percent of voucher units that fail regularly scheduled inspections	In 2009, 29 percent of voucher units failed their regularly scheduled inspections	No more than 33 percent fail regularly scheduled inspections	34 percent of voucher units failed their regularly scheduled inspections (2,353 failed inspections)	No

Seattle Housing Authority did not achieve the benchmark for hours saved through avoided inspections. This is because time savings created through an agency LEAN process resulted in efficiencies that were reinvested in inspections for the public housing high rise and scattered site units, which are now conducted every year. Every other year inspections continue for public housing units in Special Portfolio communities and every three years for Seattle Senior Housing Program buildings. If Seattle Housing Authority continues to conduct annual inspections for the majority of its buildings we may revise this benchmark.

Seattle Housing Authority did not achieve the benchmark for percent of voucher units that failed their regularly scheduled inspections in 2017. However, the percent was quite close (34 percent rather than 33 percent). At this point we do not believe that this result indicates a need to change our MTW inspections strategies, but we will continue to monitor this indicator over time.

Revisions to benchmarks or metrics

We revised the benchmark for wages to reflect inflation based on the CPI.

Data collection methods

Hours, costs, and time savings for MTW inspection protocol strategies are reported for HCV and public housing portfolios. HOPE VI communities are excluded because their staffing structure for inspections and property management are distinct and because Seattle Housing Authority has different inspection goals for these portfolios. MTW strategies such as less frequent inspections are not applied in HOPE VI communities and they are therefore not included in the data for the metrics.

Total hours and costs are reported based on inspections staff and wages only. Other costs such as mileage, overhead, and benefits are not included. Hours are calculated based on actual number of inspections staff at year end.

Hours saved from avoiding annual inspections for public housing units is based on the total number of units that did not receive a full inspection during the year multiplied by the 30 minutes averaged per inspection.

The voucher management system records the results of all inspections by type and inspection requests.

No changes were made to data collection methods in 2017.

MTW Activity #5 – Local Leases

Status

Active - First included in the 1999 MTW Annual Plan. First implemented in 1999.

Description

Seattle Housing Authority utilizes local lease strategies to incorporate best practices from the private market and to encourage self-sufficiency.

Authorization

MTW Agreement - Attachment C (C)(6), (C)(9)(b), (C)(10), (E). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-wide Local Leases Strategies

- Self-sufficiency requirement: All households receiving subsidy from Seattle Housing Authority (public housing or voucher) living in HOPE VI communities must participate in self-sufficiency activities. (MTW Strategy #5.A.01. Implemented in 1999.)

Public Housing Local Lease Strategies

- Local lease: Seattle Housing Authority may implement its own lease, incorporating industry best practices. (MTW Strategy #5.P.01. Implemented in 2011.)
- Property-specific pet policies: Seattle Housing Authority may establish pet policies, which may include the continuation or establishment of pet-free communities or limits on the types of pets allowed, on a building by building basis. (MTW Strategy #5.P.04. Implemented in 2011.)

Under development

- Lease incentives: Seattle Housing Authority may offer lease incentives to promote the leasing of a public housing unit. (MTW Strategy 5.P.05. Implementation planned for 2018.)

Inactive

- Grievance procedures: Modify grievance policies to require tenants to remedy lease violations and be up to date in their rent payments before granting a grievance hearing for proposed tenancy terminations. (MTW Strategy #5.P.02. Not yet implemented.)
- Lease term of less than one year for public housing units: Seattle Housing Authority may offer lease renewals for six months or month-to-month time periods. (MTW Strategy #5.P.03. Implemented in 2010.)

Impact

Local lease strategies are intended to promote self-sufficiency by encouraging work-able adults to participate in self-sufficiency activities and housing choice by providing living environments that are pet-free in addition to communities that allow pets.

This activity is on schedule.

Impact	Metric	Baseline (1998)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost of vacancy loss (lost rental revenue)	(2016) \$399,010	\$415,192 adjusted for inflation	\$231,977	Yes
	CE2: Total time to lease units	(2016) 26,527 vacancy days (151,583 hours)	26,527 vacancy days (151,583 hours)	17,408 vacancy days (99,474 hours)	Yes
Self sufficiency	SS1: Average earned income of households affected by HOPE VI self-sufficiency requirement in dollars	(1998) \$12,652	\$19,301 or more in wages adjusted for CPI	\$27,076	Yes
	SS3: Number of heads of households affected by HOPE VI self-sufficiency requirement and percent households employed full time, part time, and unemployed	(2014) 183 heads of households employed full-time, 179 part-time, 212 unemployed; 44% of households employed full-time, 31% part-time, 25% unemployed	183 heads of households employed full-time, 179 part-time, 212 unemployed; 44% of households employed full-time, 31% part-time, 25% unemployed	351 heads of households employed full-time, 168 part-time, 110 unemployed; 56% of households employed full-time, 27% part-time, 17% unemployed	Yes
	SS4: Number of households receiving TANF assistance	(2014) 42 HOPE VI households	42 HOPE VI households	37 HOPE VI households	Yes

Impact	Metric	Baseline (1998)	Benchmark	2017 Results	Benchmark Achieved?
Self sufficiency	SS5: Number of households affected by HOPE VI self-sufficiency requirement receiving services aimed to increase self sufficiency	(2014) 172 HOPE VI households receiving Economic Opportunity Services	172 HOPE VI households receiving Economic Opportunity Services	155 HOPE VI households receiving Economic Opportunity Services	No
	SS8: Number of households with HOPE VI self-sufficiency requirement whose primary source of income was wages	(1998) 316	500	542	Yes
	Comparison of primary source of income from wages for work-likely households with and without the HOPE VI self-sufficiency requirement	(2014) 58% of work-likely households without HOPE VI self-sufficiency requirement reported wages as primary source of income	Percent is higher than baseline for HOPE VI households with self-sufficiency requirement	62% of HOPE VI households with self-sufficiency requirement	Yes

Seattle Housing Authority did not achieve the benchmark for HOPE VI households receiving Economic Opportunity services. However, data collection on resident status for households served was not captured with consistency. We continue to work on upgrading our service tracking systems and will have a more extensive report on service delivery available for next year's report. Pending further discussion and review Seattle Housing Authority may revise this benchmark in future reports to better reflect improved data quality.

Revisions to benchmarks or metrics

We revised the benchmarks for wages and vacancy loss to reflect inflation based on the CPI.

Data collection methods

Income and unit data is routinely maintained for all household members. Baseline data from 1998 for primary source of income through wages does not include households at Holly Park, for whom this information is not available. Data on HOPE VI public housing households affected by the self-sufficiency requirement excludes Lake City Court. On-site HOPE VI service usage is tracked by our Economic Opportunities program.

Seattle Housing Authority does not track employment by full-time or part-time status and instead provides these figures using a proxy that makes assumptions based on earned income using the minimum wage rate.

MTW Activity #8 – Special Purpose Housing Use

Status

Active - First implemented prior to MTW participation in 1999 and continued throughout MTW participation.

Description

Seattle Housing Authority utilizes public housing units to provide special purpose housing and to improve quality of services or features for targeted populations. In partnership with agencies that provide social services, Seattle Housing Authority is able to make affordable housing available to households that would not likely be admitted in traditional public housing units. With this program Seattle Housing Authority allows partner agencies to use residential units both for service-enriched transitional/short-term housing and for office space for community activities and service delivery. The ability to designate public housing units for specific purposes and populations facilitates this work, by allowing units to target populations with specific service and housing needs, or specific purposes.

Authorization

MTW Agreement- Attachment C (B)(2), (B)(3), (B)(4), (C)(1), (C)(2), (C)(4), (C)(5), (C)(6), (C)(9)(a), (C)(9)(b), (C)(10), (C)(11), (C)(15); Attachment D (Uses of MTW Funds), (B). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Public Housing Special Purpose Strategies

- Agency units for housing and related supportive services: Seattle Housing Authority makes residential units available for service-enriched housing by partner agencies. (MTW Strategy #8.P.01. Implemented prior to MTW participation.)

- Agency units for services: Make residential units available as space for community activities, management use, and partner agencies providing services in and around the community. (MTW Strategy #8.P.02. Implemented prior to MTW participation.)
- Designate public housing units for special purposes/populations: Seattle Housing Authority may designate properties/units for specific purposes such as elderly or smoke-free. (MTW Strategy #8.P.03. Implemented in 2000.)
- Program-specific waiting lists: Seattle Housing Authority or agencies may operate separate waiting lists (or no waiting list) for specific programs such as service enriched units. (MTW Strategy #8.A.02. Implemented prior to MTW participation.)
- Service enriched housing: With the help of key partners, Seattle Housing Authority may develop supportive housing communities. (MTW Strategy #8.A.03. Implemented in 2001.)

Inactive

- Conditional Housing: Housing program for those who do not currently meet Seattle Housing Authority's minimum qualifications. (MTW Strategy #8.A.01. Not yet implemented.)
- Definition of elderly: Allows change in definition of elderly for HUD-designated elderly preference public housing from 62 to 55. (MTW Strategy #8.P.04. Not yet implemented.)
- Pet-free environments: Establish pet-free environments in connection with selected service enriched housing. (MTW Strategy #8.P.05. Not yet implemented.)

Impact

Special Purpose Housing Use strategies are intended to increase housing choice and self-sufficiency by providing service-enriched housing for households that would otherwise be difficult to serve in traditional housing authority units and by enabling services to be available in the community.

This activity is on schedule.

Impact	Metric	Baseline (1998)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE4: Amount of funds leveraged in dollars	\$0	\$2 million in service dollars	More than \$4.1 million in service dollars	Yes
Housing choice	HC5: Number of households able to move to a better (service-enriched) unit	0	126	592 households housed in service-enriched housing	Yes
	HC7: Number of households receiving services aimed to increase housing choice	0	126	650	Yes

Impact	Metric	Baseline (1998)	Benchmark	2017 Results	Benchmark Achieved?
Self sufficiency	SS8: Number of households that transitioned to unsubsidized housing	0	50	40 (not including medical respite)	No
	Number of on-site agencies in Seattle Housing Authority's residential units	5	5	5	Yes
Maintain and increase stability for households in service-enriched units	Percent of exiting households that leave service-enriched units for stable housing destinations (transitional, permanent, or unsubsidized market-rate housing)	0%	70%	80% of households exiting service-enriched units (77 out of 96 households exiting service-enriched units with a known destination in 2017) excluding medical respite	Yes

The number of households that transitioned from service-enriched units to unsubsidized housing in 2017 was lower than the benchmark. This is likely due to the high cost of market-rate housing in Seattle. We believe this is not necessarily cause for concern about program design, as there has been a corresponding increase in households departing for stable but subsidized housing destinations, including permanent subsidized and transitional housing, as well as households served through rapid reentry.

Revisions to benchmarks or metrics

No revisions were made.

Data collection methods

Unit use is tracked by staff in Seattle Housing Authority's property management software. Outcome measures, including households served, are reported by partner agencies according to their lease terms and contract for services.

Exit destination for medical respite program participants at Jefferson Terrace is not included for households departing for stable and unsubsidized housing destinations because the medical respite program model and goals are different. The goal for most medical respite participants is that they transition to an assisted housing program after completion of their respite care. As a result, failure to transition to unsubsidized housing in some cases indicates a positive result.

No changes were made to data collection methods in 2017.

MTW Activity #9 - Project-based Program

Status

Active - First included in the 1999 MTW Annual Plan. First implemented in 2000.

Description

Seattle Housing Authority uses MTW to develop and implement a local project-based program, providing vouchers to subsidize units in Seattle Housing Authority-owned and privately owned properties throughout Seattle. Seattle Housing Authority's project-based activities include a large number of MTW strategies to reduce costs, make project-based programs financially feasible for owners, and to provide housing choice in the city. The project-based program promotes housing choice through strategies such as offering site-specific waiting lists maintained by providers (and, therefore, does not issue exit vouchers), expanding the definition of eligible unit types, allowing more project-based units per development and overall, admitting certain types of felons, allocating vouchers to programs and providers (not just units), allowing payment standards that promote services and the financial viability of projects, and coupling housing assistance with services by working with partners. The project-based program reduces Seattle Housing Authority's costs through strategies allowing project-based owners to self-certify selected inspections and maintain their own waiting list, reducing the frequency of inspections by Seattle Housing Authority staff, streamlining admissions, and non-competitively allocating subsidies to Seattle Housing Authority units. Project-based program strategies also make contract terms consistent with requirements for other leveraged funding sources.

Authorization

MTW Agreement- Attachment C (B)(1)(b)(vi),(vii), (B)(2), (B)(4),(D)(1)(a),(b),(c),(e)(f), (D)(2), (D)(3)(b), (D)(4), (D)(5), (D)(6), (D)(7); Attachment D (B)(ix),(x),(D)(1), (D)(2); specific regulations waived include 24 CFR 982.204(a), 982.401, 982.405(a), 982.451, 983.103(c), 983.20, 983.202(a), 983.251(c), 983.260(b),

983.30, 983.51, 983.53(a)(7), 982.553(a), 983.51(e), 983.56(a), 983.59(a), 983.59(b)(1), 983.6(a), 5.609(b)(3). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Voucher Project-based Program Strategies

- Cost-benefit inspection approach: Allows SHA to establish local inspection protocol, including self-certification that inspection standards are met at time of move in for mid-year turnovers. (MTW Strategy #9.H.01. Implemented in 2004.)
- Choice offered at beginning (no exit vouchers): Because housing choice is provided at the beginning of the project-based admissions process through site-specific waiting lists, exit vouchers are not offered. (MTW Strategy #9.H.03. Implemented in 2000.)
- Contract term: Project-based commitments are renewable up to 40 years. (MTW Strategy #9.H.04. Implemented in 2000.)
- Eligible unit types: Seattle Housing Authority may allow shared housing and transitional housing under project-based contracts. (MTW Strategy #9.H.05. Implemented in 2002.)
- HAP contracts: HAP contracts are modified to ensure consistency with MTW changes and add tenancy addendum. (MTW Strategy #9.H.06. Implemented in 2000.)
- Non-competitive allocation of assistance: Seattle Housing Authority allocates project-based subsidy non-competitively to Seattle Housing Authority controlled units, including non-contiguous project-based units within a portfolio. (MTW Strategy #9.H.07. Implemented in 2000.)
- Owners conduct new construction inspections: Seattle Housing Authority may allow project-based owners to conduct their own new construction/rehab inspections and to complete unit turnover inspections. (MTW Strategy #9.H.08. Implemented in 2005.)
- Percent of vouchers that may be project-based: Seattle Housing Authority allows a greater percentage of vouchers that are project-based than non-MTW HUD limits. (MTW Strategy #9.H.09. Modified in the 2008 MTW Annual Plan.)
- Unit cap per development: Waives the 25 percent cap on the number of units that can be project-based in a multi-family building without supportive services or elderly/disabled designation. (MTW Strategy #9.H.10. Implemented in 2008.)
- Streamlined admissions: SHA may streamline and centralize applications and waiting list processes for project-based voucher units. (MTW Strategy #9.H.12. Implemented in 2000.)
- Competitive allocation process: Commit vouchers to the City's competitive process for housing funding. (MTW Strategy #9.H.13. Implemented in 2005.)
- Payment standards for Seattle Housing Authority units: Allows higher than Voucher Payment Standard for Seattle Housing Authority-operated project-based units if needed to support the project budget (while still taking into account rent reasonableness). (MTW Strategy #9.H.14. Implemented in 2004.)

- Admissions - admit felons under certain conditions: Allows for the admission into Project-based Voucher units of Class B and Class C felons subject to time-limited sex offender registration requirements who do not, in the opinion of the owner of the subsidized units, constitute a threat to others. (MTW Strategy #9.H.16. Implemented in 2005.)
- Program-based vouchers: Seattle Housing Authority allocates a floating voucher subsidy to a defined group of units or properties. (MTW Strategy #9.H.17. Implemented in 2007 in Seattle Housing Authority's Seattle Senior Housing Program.)
- Provider-based vouchers: Provide vouchers to selected agencies to couple with intensive supportive services. The agency master leases units and subleases to tenants. (MTW Strategy #9.H.18. Implemented in 2007.)
- Partners maintain own waiting lists: Allow partners to maintain waiting lists for partner-owned and/or operated units/vouchers and use own eligibility and suitability criteria. (MTW Strategy #9.H.20. Formerly 12.H.01. Implemented in 2000.)
- COPES housing assistance payment calculations: Count as zero income for residents who are living in project-based units at assisted living properties where Medicaid payments are made on their behalf through the COPES system (MTW Strategy 9.H.21. Implemented prior to MTW status.)

Inactive

- Assets in rent calculation: Only calculate income on assets declared as valuing \$5,000 or more. (MTW Strategy #9.H.02. Implemented in 2005, superseded by MTW Strategy #10.H.12, which increased the threshold for calculating asset income to an amount up to \$50,000.)
- Rent cap-30 percent of income: Project-based participants cannot pay more than 30 percent of their adjusted income for rent and utilities. (MTW Strategy #9.H.11. Implemented in 2000.)
- Subsidy cap in replacement units: Cap subsidy at levels affordable to households at 30% AMI in project-based HOPE VI replacement units where Seattle Housing Authority also contributed capital to write-down the unit's affordability to that level. (MTW Strategy #9.H.15. Included in the 2004 MTW Annual Plan and currently active as a policy; however, we believe that MTW authority is not required for this policy at this time. If HUD policies change, we will reactivate this MTW activity.)
- Streamlined admissions and recertifications: Seattle Housing Authority may streamline admissions and recertification processes for provider-based, project-based and mod rehab programs. (MTW Strategy #9.H.19. Not yet implemented.)

Impact

The project-based program is intended to promote cost effectiveness by reducing staff time and leveraging funding, as well as expanding housing choice by increasing access to service-enriched affordable housing.

This activity is on schedule.

Impact	Metric	Baseline (1999)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost to administer project-based vouchers	0	\$507,093 or less in wages adjusted for CPI	\$628,700	No
	CE2: Total time to administer project-based vouchers in staff hours	0	16,640 or less (8 FTE)	21,840 (10.5 FTE)	No
	CE4: Amount of funds leveraged in dollars	0	\$200,000 or more	\$3.9 million	Yes
	SHA hours saved by allowing partners to maintain their own waiting lists and not conducting new and turnover inspections	0	1,400 hours or more annually	1,011 hours	No
	Seattle Housing Authority hours spent on project-based v tenant-based vouchers (Year end FTEs per leased vouchers)	.005 FTE per leased tenant-based voucher (26.5 FTE for 5,771 tenant-based vouchers)	Average staff time for project-based voucher is equal to or less than average staff time for tenant-based voucher	.003 FTE per leased project-based voucher (10.5 FTE for 3,362 project-based vouchers)	Yes
Housing choice	HC4: Number of households at or below 80% AMI that would lose assistance or need to move	0 households	50 households or fewer	33 households	Yes
	HC5: Number of households able to move to a better (service-enriched) unit	0	500	674	Yes

Seattle Housing Authority did not meet staff time and cost benchmarks for 2017 because the project-based program has grown larger and continues to increase each year, particularly as Yesler projects come online in addition to the housing authority's commitment to the City's affordable housing levy. Since the metrics were first developed in 2013, Seattle Housing Authority's project-based voucher program has increased by nearly 20 percent.

There were also fewer hours saved by allowing partners to maintain their own waiting lists and not conducting new and turnover inspections in 2017, because there were fewer total new move-ins over the course of the year. We believe this is due in part to guidance from All Home (formerly Seattle/King County's Committee to End Homelessness) that has encouraged local homeless family programs to move from transitional to permanent housing models, which creates less movement among families.

Revisions to benchmarks or metrics

We adjusted the benchmark for wages to reflect inflation based on the CPI.

Data collection methods

Seattle Housing Authority maintains detailed tenant, inspection, landlord, and voucher allocation information in its voucher management system. Partner agencies maintain waiting list information and commit to service levels in their application for project-based vouchers. Staff hours are calculated based on actual number of project-based staff. Time savings are based on an estimated one hour of time saved processing a new tenant application for each new household served off of a partner's waiting list and one half hour per turnover inspection avoided. Comparative time savings between project-based and tenant-based vouchers are calculated based on leased vouchers only and exclude special purpose vouchers and port outs. Total costs represent staff wages only.

No changes were made to data collection methods in 2017.

MTW Activity #10 – Local Rent Policy

Status

Active - First included in the 2000 MTW Annual Plan. First implemented in 2000.

Description

Seattle Housing Authority's rent policy tackles a number of objectives, including cost effectiveness and self-sufficiency through an absolute minimum rent and asset income threshold and through streamlined rent review processes.

Authorization

MTW Agreement - Attachment C (C)(4), (C)(11), (D)(1)(c), (D)(2)(a),(c); Specific regulations waived include 24 CFR 982.352(b)(iv), 982.508, 24 CFR 982.517, 982.604(a), and 5.609, including the Small Area Fair Market Rents final rule. Our MTW authority is used for the strategies described below.

No changes in authorization were made in 2017.

Agency-wide Rent Policy Program Strategies

- Streamlined income verification: Seattle Housing Authority may adopt tax credit rules or the rules of other major funders regarding the length of time income verification documents are considered valid for income review processes. (MTW Strategy #10.A.01. Implemented in 2014.)

Public Housing Rent Policy Program Strategies

- Absolute minimum rent: The minimum rent for all residents will be established annually by Seattle Housing Authority. No rent will be reduced below the minimum rent amount by a utility allowance. (MTW Strategy #10.P.01. Implemented in 2001.)
- Earned Income Disregard: HUD's Earned income Disregard is not offered to public housing residents. (MTW Strategy #10.P.02. Implemented in 2001.)
- Rent reviews for elderly and disabled households every three years: Rent reviews conducted for elderly and disabled households on a triennial basis with rent increases by Social Security Cost of Living Adjustment in intervening years, including 40 month window for scheduling. (MTW Strategy #10.P.03. First implemented in 2004.)
- Imputed income from public benefits: Seattle Housing Authority may impute income in rent calculation for tenants declaring no income who are eligible for but decline to collect cash benefits. (MTW Strategy #10.P.08. Implemented in 2005.)
- Streamlined for fixed income: Further streamline rent policy and certification process for fixed income households, including self-certification of medical expenses. (MTW Strategy#10.P.13. Implemented in 2014.)
- SSHP rent policy: Rents in Seattle Senior Housing Program (SSHP) units are one of five flat rents based on the tenant's percentage of Area Median Income, with annual adjustments and income reviews only every three years. (MTW Strategy #10.P.17. Implemented in 2011.)

- No HUD-defined flat rents: Seattle Housing Authority does not offer tenants the choice of flat rents as required of non-MTW agencies, and does not use flat rents in the rent calculation for mixed citizenship households. (MTW Strategy #10.P.18. Implemented in 2001).
- Asset income threshold: Seattle Housing Authority will increase the threshold for including asset income in rent contribution calculations to an amount up to \$50,000 for public housing program participants and may allow self-certification of assets below the threshold. (Strategy #10.P.19. Formerly 10.P.17. Implemented in 2013.)
- Simplified Utility Assistance Payment for HOPE VI communities: HOPE VI participants receive a water and sewer utility allowance in the form of a maximum level of consumption rather than a rent reduction and incentive for conservative consumption. Annual adjustments are made at the next regularly scheduled annual review or update. (MTW Strategy #10.P.20. Implemented in 2013.)
- Market rate rent policy: Seattle Housing Authority may institute market rate rents as a penalty for noncompliance with the annual review process. (MTW Strategy #10.P.21. Implemented in 2005.)
- Delay in rent increase for newly employed households: Seattle Housing Authority may allow a longer notification period before rent increase if the increase is due to the resident becoming employed after at least six months of unemployment and is self-reported by the resident in a timely manner. (MTW Strategy 10.P.22. Implemented in 2005.)
- Self Employment Expenses: Households may declare employment expenses up to set threshold of gross income without further validation of deductions. (MTW Strategy #10.P.23. Implemented in 2015.)

Not Needed in 2017

- Utility allowance-schedule: Seattle Housing Authority may change utility allowances on a schedule different for current residents and new move-ins. (MTW Strategy #10.P.12. Implemented in 2008.)
- Utility allowance-frequency of utility allowance updates: Seattle Housing Authority may revise the schedule for reviewing and updating utility allowances due to fluctuations in utility rates. (MTW Strategy #10.P.15. Implemented in 2010 for selected mixed-finance communities.)

Inactive

- Rent freezes: Voluntary rent policy freezes rent in two year intervals. (MTW Strategy #10.P.04. Implemented in 2001, inactive since 2005.)
- TANF rent calculation: Calculate TANF participant rent on 25% of gross income. (MTW Strategy #10.P.05. Implemented in 2000, inactive since 2005.)
- Tenant Trust Accounts (TTA): A portion of working public housing residents' income may be deposited in an escrow account for use toward self-sufficiency purposes. (MTW Strategy #10.P.06. Implemented in 2001; inactive since Fall 2012.)
- Ceiling rent two year time limit: When a tenant's calculated rent reaches the ceiling rent for their unit, the rent will not be increased beyond the rent ceiling for 24 months. (MTW Strategy #10.P.07. Implemented in 2005; inactive since Fall 2012.)

- Partners develop separate rent policies: Allow partner providers and HOPE VI communities to develop separate rent policies that are in line with program goals and/or to streamline. (MTW Strategy #10.P.09. Not yet implemented.)
- Studio vs. 1 bedroom: Differentiate rents for studios vs. 1 bedroom units. (MTW Strategy #10.P.10. Not yet implemented.)
- Utility allowance-self-sufficiency and resource conservation: Change utility allowance where metering permits to encourage self-sufficiency and resource conservation. (MTW Strategy #10.P.11. Not yet implemented.)
- Streamlined rent policy for partnership units: Allow non-profit partners operating public housing units to implement simplified rent policies. (MTW Strategy #10.P.14. Not yet implemented.)
- Utility allowance-local benchmark: Seattle Housing Authority may develop new benchmarks for "a reasonable use of utilities by an energy conservative household" - the standard by which utility allowance are calculated. (MTW Strategy #10.P.16. Not yet implemented.)

Voucher Rent Policy Program Strategies

- Rent burden-include exempt income: Exempt income included for purposes of determining affordability of a unit in relation to 40 percent of household income. (MTW Strategy #10.H.01. Implemented in 2005.)
- Rent cap-use gross income: Rent burden may be calculated on 40 percent of gross income, up from HUD's standard 30 percent of adjusted income. (MTW Strategy #10.H.02. Implemented in 2005.)
- Rent reasonableness at Seattle Housing Authority owned units: Allows Seattle Housing Authority staff to perform rent reasonableness determination for Seattle Housing Authority owned units. (MTW Strategy #10.H.03. Implemented in 2000.)
- Payment standard: Seattle Housing Authority may develop local voucher payment standards, including supplements for opportunity areas, and different standards for market-rate and affordable housing and shared housing. (MTW Strategy #10.H.04. Implemented in 2016.)
- Payment standard-SROs: Seattle Housing Authority may use the studio payment standard for SRO units. (MTW Strategy #10.H.06. Implemented in 2003.)
- Rent reasonableness streamlining: Allows Seattle Housing Authority to streamline rent reasonable determinations, including automatic annual updates and shared housing. (MTW Strategy #10.H.09. Implemented in 2017.)
- Rent reviews for elderly and disabled households every three years: Rent reviews for elderly and disabled households conducted triennially, including 40 month window for scheduling. (MTW Strategy #10.H.10. Implemented in 2010.)
- 180-day EOP clock (Previous MTW Strategy #10.H.11 has been renumbered 13.H.02 and moved to the following section on Homeownership and Graduation from Subsidy.)
- Asset income threshold: Increased threshold for calculating asset income to an amount up to \$50,000 and self-certification of assets below the threshold. (MTW Strategy #10.H.12. Implemented in 2010.)

- Streamlined medical deduction: Seattle Housing Authority may allow self-certification of medical deductions. (MTW Strategy #10.H.13. Implemented in 2011.)
- Simplified utility allowance schedule: HCV participants' rent is adjusted for a Utility Estimate based on the number of bedrooms (defined as the lower of voucher size or actual unit size) and tenant responsibility for payment of energy, heat, and sewer/water under their lease, with a proration for energy-efficient units. (MTW Strategy #10.H.14. Implemented in 2011.)

Inactive

- Absolute minimum rent: The minimum rent for all residents will be established annually by Seattle Housing Authority. No rent will be reduced below the minimum rent amount by a utility allowance. (MTW Strategy #10.H.05. Not yet implemented.)
- Tenant-based self-sufficiency incentives: Rent policies to foster self-sufficiency among employable households, including income disregards proportional to payroll tax; allowances for employment-related expenses; intensive employment services coupled with time limits; locally-defined hardship waivers. (MTW Strategy #10.H.07. Not yet implemented.)
- Imputed income from TANF: Impute TANF income if household appears eligible and has not documented ineligibility. TANF not counted toward income if family is sanctioned. (MTW Strategy #10.H.08. Not yet implemented.)

Impact

Local rent policy strategies are intended to promote cost effectiveness by saving staff time and to support self-sufficiency by encouraging households to build income, employment, and assets.

This activity is on schedule.

Impact	Metric	Baseline (1999)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost of recertifications	(2009) \$720,966 in wage costs attributable to preparing and conducting certifications	\$841,777 or less in wage costs attributable to preparing and conducting certifications, adjusted for inflation	\$1,204,281 in wage costs attributable to preparing and conducting recertifications	No
	CE2: Total time to complete recertifications in staff hours	(2009) 32,036 staff hours	37,267 or less staff hours	45,407 staff hours	No
	Staff time savings from local rent policy	(1999) 0	1,100 or more hours saved from local rent policy strategies	2,873 hours	Yes

Impact	Metric	Baseline (1999)	Benchmark	2017 Results	Benchmark Achieved?
Housing choice	HC4: Number of households at or below 80% AMI that would lose assistance or need to move	(2013) 69 public housing evictions	69 or fewer public housing evictions	56 public housing evictions	Yes
Self sufficiency	SS1: Average earned income of households affected by absolute minimum rent	(1999) \$13,815	\$20,728 or more in earned income adjusted for CPI	\$21,068	Yes
	SS3: Number of heads of household and percent of work-able households employed full time, part time, or unemployed	(2014) 455 work-able heads of households employed full-time, 552 part-time, 662 unemployed; 34% of work-able households employed full-time, 34% part-time, 33% unemployed	455 work-able heads of households employed full-time, 552 part-time, 662 unemployed; 34% of work-able households employed full-time, 34% part-time, 33% unemployed	654 work-able heads of households employed full-time, 402 part-time, 406 unemployed; 45% of work-able households employed full-time, 27% part-time, 28% unemployed	Yes
	SS4: Number of households receiving TANF assistance	(2014) 212	212	153	Yes
	SS8: Number of households in properties with absolute minimum rent that have primary source of income from wages	(1999) 1,080	1,200	1,382	Yes

Seattle Housing Authority did not meet the benchmark for staff time and cost spent on recertifications due to a high number of interim reviews conducted to process utility allowance changes.

Revisions to benchmarks or metrics

We adjusted the benchmarks for costs and income to reflect inflation based on the CPI.

Rent Reform Hardship Requests

In 2017, there were zero hardship requests under the public housing rent policy and 84 hardship requests under the voucher program rent policy. A total of 17 of the voucher program requests were approved at the department level, while the remaining requests were either denied or referred to the ADA Committee for further consideration.

Data collection methods

Seattle Housing Authority began implementing rent reforms in 2001. However, meaningful data from that time period for staffing and hours spent on recertifications is unavailable. We therefore use 2009 as the baseline year for recertification metrics because data is available and because this year precedes implementation of a round of rent policy strategies that had a measurable impact on staff hours, including implementation of triennial recertifications in the HCV program. Seattle Housing Authority conducted a 2013 time study to determine the amount of staff time spent on public housing annual and interim recertifications and a 2011 time study for the HCV program. Reported costs in this category reflect only staff wages attributable to conducting certifications and do not include benefits, taxes, or costs for resources such as postage and paper. Total wages are calculated by multiplying median wage rates for the staff positions times the amount of time per certification times the number of certifications. This methodology is used rather than total wages because many staff are engaged in a number of activities not related to certifications.

Baseline data for 1999 for households whose primary source of income is through wages does not include Holly Park because this data is not available.

Seattle Housing Authority does not maintain records on hours worked by participants. Data on employment by full time, part time, and unemployed status are instead calculated based on total earned income divided by the minimum wage rate.

Seattle Housing Authority maintains records in Yardi, the system of record for public housing, of self-employed participants' selection of the streamlined deduction or full verification of actual expenses.

Recertification data excludes mod rehab units and port-in voucher households, which do not apply MTW rent policies.

No changes were made to data collection methods in 2017.

MTW Activity #11 – Resource Conservation

Status

Active - First included in the 2000 MTW Annual Plan. First implemented in 2000.

Description

Seattle Housing Authority's resource conservation strategies take advantage of the agency's existing relationships with the City of Seattle and local utility providers, which continuously identify opportunities to increase resource conservation and reduce costs, rather than conducting a HUD-prescribed energy audit every five years. Conservation strategies have achieved significant energy and cost savings to the agency, including conversion to more efficient toilets and electrical upgrades.

Authorization

MTW Agreement - Attachment D (C)(1). Our MTW authority is used for the strategy described below.

No changes were made to authorizations in 2017.

Public Housing Resource Conservation Strategies

- Energy protocol: Seattle Housing Authority employs a cost-benefit approach for resource conservation in lieu of HUD-required energy audits every five years. (MTW Strategy #11.P.01. Implemented in 2000.)

Impact

Resource conservation strategies are intended to increase cost effectiveness by working continuously with local utility providers and the City of Seattle to identify conservation measures in a timely manner and avoiding the cost of hiring a third party to conduct energy audits every five years.

This activity is on schedule.

Impact	Metric	Baseline (2009)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost of energy audits in dollars	\$102,000	\$119,092 or less adjusted for CPI	\$29,700	Yes
	Savings from water conservation measures (primarily toilet replacement)	0	\$900,000/year	\$1.8 million in 2017; \$16.7 million since implementation	Yes
Cost effectiveness	Savings from electricity conservation measures (homeWorks renovations 2004-2009)	0	\$147,000/year	\$449,942 in 2017; \$2.35 million since implementation	Yes

Revisions to benchmarks or metrics

The benchmark for cost of energy audits was revised to reflect inflation.

Data collection methods

Seattle Housing Authority maintains detailed utility consumption and rate data supplied by utility providers and Seattle Housing Authority's own system. Cost savings measures look solely at the impact of conservation initiatives and are not an agency-wide measure of utility usage. For example, portfolios that were not included in the conservation initiatives are not included in the analysis. Cost savings represent the total amount of energy saved through conservation initiatives and do not distinguish between resulting decreases in expenses for the agency and for tenants.

Water and electricity conservation measures saved Seattle Housing Authority more than \$2 million in 2017.

The baseline cost of energy audits is based on the real cost to SHA of \$51,000 for an energy audit of 520 units in 2009, resulting in a proportionate estimated cost of \$510,000 for 5,200 public housing units. Since energy audits are required only once every five years, this is divided by five to calculate an average annual cost of \$102,000 for the baseline. The cost of energy audits is based on a percentage (15 percent and 20 percent respectively) of the median salary for

two Seattle Housing Authority staff responsible for energy and utility analysis. This analysis does not include factors such as overhead or benefits.

No changes were made to data collection methods in 2017.

MTW Activity #12 – Waiting Lists, Preferences, and Admission

Status

Active - First included in the 2000 MTW Annual Plan. First implemented in 2000.

Description

Seattle Housing Authority's waiting list, preferences, and admission strategies have two primary objectives: to decrease costs and to facilitate partnerships with agencies that provide supportive services. Seattle Housing Authority's MTW flexibilities in this area allow the agency to provide a greater percentage of vouchers to service providers and make special decisions if needed to prevent homelessness. These strategies also expedite admission into the program for partner agencies' clients by allowing agencies to maintain their own waiting lists and allowing applicants referred by selected providers to receive the next available unit.

Authorization

MTW Agreement - Attachment C (B)(1)(b)(vi), (C)(1), (C)(2), (D)(4); Specific regulations waived include 24 CFR 982.204(a),(f). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Public Housing Waiting Lists, Preferences, and Admission Strategies:

- Partners maintain own waiting lists: Seattle Housing Authority allows partners to maintain waiting lists for partner-owned and/or operated units (traditional LIPH units; service provider units, etc.) and use their own eligibility and suitability criteria (including no waiting list). (MTW Strategy #12.P.02. Implemented in 2000.)
- Expedited waiting list: Seattle Housing Authority allows applicants referred by selected partners (primarily transitional housing providers) to receive expedited processing and receive the "next available unit." (MTW Strategy #12.P.03. Implemented in 2004.)
- Eligibility criteria: Unique eligibility criteria for specific units or properties, such as service enriched units. (MTW Strategy #12.P.05. Implemented in 2008.)
- Seattle Senior Housing Program (SSHP) waiting list policy: Seattle Housing Authority does not distinguish between senior and non-senior disabled households in filling vacancies in the SSHP portfolio based on bedroom size, while maintaining a 90 percent senior, 10 percent non-senior disabled ratio at the AMP level. (MTW Strategy #10.P.06. Implemented in 2013.)

Inactive

- Site-based waiting lists: Applicants can choose from several site-specific and/or next available waiting lists. (MTW Strategy #12.P.01. First approved in 1999, but MTW flexibility is no longer required.)
- No waiting list: Allows for filling units without a waiting list. (MTW Strategy #12.P.04. Has not yet been implemented.)

Voucher Waiting Lists, Preferences, and Admission Strategies:

- Voucher distribution through service provider agencies: Up to 30 percent of Seattle Housing Authority's tenant-based vouchers may be made available to local nonprofits, transitional housing providers, and divisions of local government that provide direct services for use by their clients without regard to their client's position on Seattle Housing Authority's waiting list. (MTW Strategy #12.H.02. Implemented in 2002.)
- Special issuance vouchers: Seattle Housing Authority has established a "special issuance" category of vouchers to address circumstances where timely issuance of vouchers can prevent homelessness or rent burden. (MTW Strategy #12.H.03. Implemented in 2003.)
- Limit eligibility for applicants in subsidized housing: Implements limits or conditions for tenants living in subsidized housing to participate in the HCV program. For example, before issuing a public housing resident a voucher, they must fulfill the initial term of their public housing lease. (MTW Strategy #12.H.05. Implemented in 2012.)
- Streamlined eligibility verification: Streamline eligibility verification standards and processes, including allowing income verifications to be valid for up to 180 days. (MTW Strategy #12.H.06. Not yet implemented.)

Inactive

- Local preferences: Seattle Housing Authority may establish local preferences for federal housing programs. (MTW Strategy #12.A.01. Included in the 2002 MTW Annual Plan; however, this policy is available to all PHAs.)
- Admit applicants owing SHA money: Provide voucher assistance to households owing SHA money from prior tenancy under specific circumstances, for example if they enter into a repayment agreement. (MTW Strategy #12.H.04. Implemented in 2008 and still in place; however MTW authority is no longer needed.)

Impact

Waiting list, preferences, and admission strategies are intended to increase cost effectiveness by reducing avoidable turnover and avoiding costs for tasks that can be fulfilled by service providers.

This activity is on schedule.

Impact	Metric	Baseline (1999)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost of waiting lists and admissions in dollars	\$442,791 in wages for admissions staff	\$664,386 or less in wages adjusted for CPI	\$481,916 in wages for admissions staff	Yes
	CE2: Total time to complete waiting lists and admissions in staff hours	24,960 (12 FTE)	20,800 (10 FTE) or less	16,640 (8 FTE)	Yes
	Savings from agencies maintaining their own waiting lists	0	\$24,960	\$2,925	No
Increase availability of affordable housing in combination with supportive services	Number of applicants newly receiving housing through agency referrals or waiting lists	0	75	15 in 2017 (0 through the expedited waiting list and 15 through agency vouchers)	No

SHA did not achieve the benchmark for applicants newly receiving housing through agency referrals or the expedited waiting list, or the related metric regarding time savings from these strategies. The decrease in public housing admissions through the expedited waiting list reflects a management decision to halt the processing of expedited applications in order to increase agency-wide capacity for admissions. Additionally it reflects Seattle Housing Authority's increased ability to serve homeless households through general admissions with the secondary review process, which provides an intensive, individualized assessment process for applicants that may lack a current positive rental history and through project-based voucher contributions to the community's housing first efforts. The number of Housing Choice Voucher admissions through agency referrals also decreased in 2017 because most of the existing contracts are not renewable and as a result the total number has decreased over time. We may adjust benchmarks for these activities in future plans and reports once a permanent decision has been made about their implementation.

Revisions to benchmarks or metrics

The benchmark for staffing costs was adjusted to reflect inflation.

Data collection methods

Avoided costs from agencies maintaining their own waiting lists is calculated based on savings of \$195 per newly occupied unit for partnership and service-provider operated housing units. The \$195 per unit is derived from the agency's real cost in 2010 of \$879,050 to conduct regular admissions for 4,500 units.

Hours are calculated based on actual number of admissions staff. Staff costs are calculated based on the median wage per position, but do not include other costs such as benefits and overhead.

No changes to data collection methods were made in 2017.

MTW Activity #13 – Homeownership and Graduation from Subsidy

Status

Active - First included in the 2004 MTW Annual Plan. First implemented in 2004.

Description

Seattle Housing Authority strives to support participants in the multiple ways that households can successfully move away from housing subsidy. These strategies include not only homeownership programs, but also programs that incentivize households transitioning to unsubsidized rental units in the private market, including end of participation policies for higher income households.

Authorization

MTW Agreement - Attachment C (B)(1),(D)(8); Attachment D (B). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-wide Homeownership and Graduation from Subsidy Strategies

Inactive

- Savings match incentive: Seattle Housing Authority has implemented a program that matches savings and provides financial information for participating public housing and HCV households leaving subsidized housing for homeownership or unsubsidized rental units. (Strategy #13.A.02. Implemented in 2013.)
- Down payment assistance (DPA): allocates MTW Block Grant funds to offer a local down payment assistance program. (MTW Strategy #13.A.01. Implemented in 2004.)

Public Housing Homeownership and Graduation from Subsidy Strategies

- End of Participation for higher income households in mixed-income communities: In mixed-income communities, Seattle Housing Authority will remove subsidy when household income exceeds the established limit for six months. (MTW Strategy #13.P.01. Implemented in 2016.)

Voucher Homeownership and Graduation from Subsidy Strategies

- The 180-day End of Participation “clock” due to income will start when a family’s Housing Assistance Payment (HAP) reaches \$50 or less. (MTW Strategy #13.H.02. Formerly #10.H.11. Implemented in 2010.)

Inactive

- Monthly mortgage assistance (MTW Strategy #13.H.01. Not yet implemented.)

Impact

Homeownership and graduation from subsidy strategies promote self-sufficiency and create housing opportunities for waiting list households by helping participants leave subsidized housing. This activity is on schedule.

Impact	Metric	Baseline	Benchmark	2017 Results	Benchmark Achieved?
Housing choice	HC6: Number of households that purchased a home through homeownership and graduation from subsidy strategies	0	5	2	No
Self sufficiency	SS8: Number of households who transitioned to unsubsidized housing due to homeownership and graduation from subsidy strategies	0	25	69	Yes

Seattle Housing Authority did not achieve the benchmark for number of households that purchased a home through homeownership and graduation from subsidy strategies. This is due in part to the savings match program, where no households purchased a home in 2017. Internal evaluation of this pilot program has found lower than projected numbers of graduating households and as a result we have placed a hold on new enrollments as we consider alternate strategies to support asset building.

Revisions to benchmarks or metrics

No changes were made.

Data collection methods

Savings Match and Down Payment Assistance program participation is tracked through spreadsheets maintained by Seattle Housing Authority staff. End of participation information is maintained in Seattle Housing Authority's participant databases.

Homeownership is not tracked for households leaving the HCV program due to the end of participation clock.

No changes were made to data collection methods in 2017.

MTW Activity #15 – Combined Program Management

Status

Active - First included in the 2008 MTW Annual Plan. First implemented in 2008.

Description

In some of its communities, Seattle Housing Authority co-locates units funded through project-based vouchers with low income public housing or with other units managed by SHA staff. Combining program management and policies for both of these types of units within the same community makes sense and reduces costs by eliminating redundancies, including duplicative rent reviews and inspections. It also avoids unnecessary disparities between tenants of the two different types of units. Seattle Housing Authority's implementation of this activity allows units subsidized by project-based housing choice vouchers to be operated just like public housing subsidized units.

Authorization

MTW Agreement, Attachment C (C)(1), (C)(2), (C)(4), (C)(9), (C)(10), (C)(11), (D)(1), (D)(2), (D)(3), (D)(4), (D)(5), (D)(7); specific regulations waived include 24 CFR 983.51(b)(2). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-wide Combined Program Management Strategies

- Combined program management: Combined program management for project-based vouchers co-located with public housing or other units in communities operating both subsidy types. (MTW Strategy #15.A.01. Implemented in 2008.)

Impact

Combined program management strategies are intended to increase cost effectiveness by decreasing staff time through the elimination of duplicated activities, such as inspections and waiting lists, and the streamlining of rent and other policies that would otherwise be similar, but different, if the units were operated under the separate subsidy programs.

This activity is on schedule.

Impact	Metric	Baseline (2007)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost to complete recertifications for combined program management units	\$10,335	\$12,587 or less adjusted for CPI	\$10,674	Yes
	CE2: Total time to complete recertifications for combined program management (SLIHP) units	472 hours	450 hours or less	404 hours	Yes

Revisions to benchmarks or metrics

The cost benchmark was adjusted to reflect inflation.

Data collection methods

Staff time is calculated based on a 2011 voucher time study and 2013 public housing time study, which found that on average it took 16 minutes to key an annual review in HCV's data system of record, plus an average of 146 total minutes to complete a regular recertification in public housing. The time required for a regular recertification in public housing is used as a proxy for the equivalent amount of time required to complete an annual tax credit certification in the HOPE VI units. The baseline figure is derived from the average total time required to complete a public housing annual review plus the average total time required to complete a project-based voucher annual review.

The data provided on time saved through this strategy reflects only time spent on annual recertifications and does not reflect the added opportunities for efficiencies through unified waiting lists and inspections. Data on cost savings reflects median wage levels only and excludes other factors such as overhead, benefits, and postage.

No changes were made to data collection methods in 2017.

MTW Activity #18 – Short-Term Assistance

Status

Active - First included in the 2013 MTW Plan. First implemented in 2013.

Description

Seattle Housing Authority is working on multiple fronts with community partners to develop innovative new assistance programs that are designed to be short-term in length. These programs help households both access and retain housing through one-time or temporary assistance such as rent, deposits, arrears, utility assistance, moving and relocation costs, and temporary housing as needed. Short-term assistance is paired with targeted services when needed, including connections to employment, childcare services, and domestic violence counseling.

Authorization

MTW Agreement, Attachment D (B). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-Wide Short-Term Strategies

- Emergency Assistance for Housing Stability: Seattle Housing Authority may disregard one-time or short-term emergency assistance from other sources to prevent households from losing their housing in determining eligibility and rent contribution. (MTW Strategy #18.A.02. Implemented in 2014.)

Inactive

- Interagency Domestic Violence Transfer Program: In collaboration with partnering MTW agencies and domestic violence service providers, Seattle Housing Authority may participate in an inter-jurisdictional transfer program to assist residents and program participants who become victims of domestic violence and need to move to another jurisdiction. (MTW Strategy #18.A.01. Not yet implemented.)

Voucher Short-Term Strategies

Inactive

- Short-Term Rental Assistance: Seattle Housing Authority may provide funding for short-term shallow rental assistance through cooperative community initiatives to help families, students, adults, and youth obtain and retain housing. (MTW Strategy #18.H.01. Implemented in 2013.)

Impact

Short-term assistance strategies contribute to self-sufficiency by providing youth and adults with the services and financial assistance that they need to remain stable in their housing and/or to obtain housing.

This activity is on schedule.

Impact	Metric	Baseline (2012)	Benchmark	2017 Results	Benchmark Achieved?
Housing choice	HC1: Number of new units for domestic violence survivors made available for households at or below 80% AMI through the interagency domestic violence transfer program	0	3 households annually	0	No
	HC4: Number of households at or below 80% AMI that would lose assistance or need to move without access to emergency assistance funds	0	0	0	Yes
	HC5: Number of households able to move to a better unit	0	3 households annually	0	No
	HC7: Number of households receiving services aimed to increase housing choice	0	25 households annually	0	No

Seattle Housing Authority did not achieve the benchmark for the inter-agency domestic violence transfer agreement because the program has not been implemented. We are currently considering the strategy inactive.

Seattle Housing Authority did not achieve benchmarks for short-term rental assistance because the agency did not provide funding for households in this program in 2017. The short-term rental assistance program found that restrictions on Seattle Housing Authority's federal funds made them difficult to administer. The program will continue to move forward with rapid rehousing with funding from other sources. In future plans and reports we may revise this benchmark to reflect the discontinuance of this activity.

Revisions to benchmarks or metrics

No changes were made.

Data collection methods

Outcomes for youth and families served are tracked through both program records and HMIS.

Seattle Housing Authority reports zeros for the benchmark and annual outcome for emergency assistance for housing stability (18.A.02) because the policy allows the agency to disregard this type of emergency assistance. We do not maintain documentation of emergency assistance because it is excluded through this policy.

No changes were made to data collection methods in 2017.

MTW Activity #19 – Mobility and Portability

Status

Active - First included in the 2013 MTW Plan. Not yet implemented.

Description

Mobility and portability strategies are designed to support cost effectiveness and to increase access to targeted units and neighborhoods for voucher holders.

Authorization

MTW Agreement, Attachment C (D)(1)(g); (B)(1).

No changes were made to authorizations in 2017.

Voucher Mobility Strategies

- One Year Residency Requirement before Port Out: SHA may require that Housing Choice Voucher households live in Seattle for one year before moving with their voucher to a different community. (MTW Strategy 19.H.03. First implemented in 2015.)

Not Needed in 2017

- Limiting portability in high cost areas: Seattle Housing Authority may deny requests for portability moves to another jurisdiction when the receiving housing authority intends to administer rather than absorb the voucher and the resulting payment standard would be higher than SHA's payment standard. (MTW Strategy #19.H.01. Not yet implemented.)
- Housing Choice Moving Cost Assistance and Support: Seattle Housing Authority may develop a program for voucher households to provide assistance with housing search, deposits and similar costs, outreach and incentives for landlord participation such as risk reduction funds, and access supplements. (MTW Strategy #19.H.02. MTW authority was not needed in 2017.)

Impact

Mobility and portability strategies support cost effectiveness by reducing agency costs and time commitments. This activity is on schedule.

Impact	Metric	Baseline (2014)	Benchmark	2017 Results	Benchmark Achieved?
Cost effectiveness	CE1: Total cost of task in dollars	\$17,332	\$15,769 (adjusted for inflation)	\$3,697	Yes
	CE2: Total time to complete port out processing in staff hours	419 hours	369 hours per year once fully implemented	149 hours	Yes

Revisions to benchmarks or metrics

No revisions were made in 2017.

Data collection methods

Seattle Housing Authority maintains records of households that have ported out of Seattle in Elite, the current system of record for the Housing Choice Voucher program. Time estimates represent initial port out processing only and do not include subsequent activities such as annual port out updates. Cost estimates represent staff wages and do not include overhead.

MTW Activity #20 – Local Non-Traditional Affordable Housing Strategies

Status

Active - First described as an MTW activity in the 2013 MTW Plan in response to HUD guidance. First implemented in 1999.

Description

Seattle Housing Authority sometimes uses MTW Block Grant funds to support affordable housing outside of the traditional public housing and voucher programs. This support may include funding for development, capital improvements, and both physical and financial maintenance. While this was previously an unremarkable use of MTW Block Grant funds under our Local Asset Management Program, subsequent guidance from HUD on local non-traditional activities (PIH Notice 2011-45) has made it advisable for us to call out this use of funds as an MTW activity.

This use of MTW funds allows Seattle Housing to maintain or broaden the availability of housing in the city affordable to households below 80 percent of Area Median Income. This activity may include both short and long term funding for development, capital improvement, and maintenance of affordable housing units. It may also provide financial maintenance, such as the contribution of funds to meet an established Debt Coverage Ratio, required for continued operation of the affordable units.

Authorization

MTW Agreement, Attachment D – Use of Funds.

No changes were made to authorizations in 2017.

Agency-wide Local Non-Traditional Strategies

- Use of Funds for Local Non-Traditional Affordable Housing: SHA may use Block Grant funds to develop, capital improve, and/or maintain and operate affordable housing outside of the traditional public housing and voucher programs. (MTW Strategy #20.A.01. First described as an MTW strategy in the 2013 Plan in response to HUD guidance. Implemented in 1999.)

Impact

Local Non-Traditional Affordable Housing strategies support housing choice by preserving affordable housing options for households below 80 percent AMI throughout the city of Seattle.

This activity is on schedule.

Impact	Metric	Baseline (1998)	Benchmark	2017 Results	Benchmark Achieved?
Housing choice	HC1: Number of new units made available for households at or below 80% AMI	0	596 units	685 units (cumulative)	Yes
	HC2: Number of housing units preserved for households at or below 80% AMI that would otherwise not be available.	0	90 units	393 units	Yes

Revisions to benchmarks or metrics

No revisions were made.

Data collection methods

Seattle Housing Authority routinely tracks information on all of its housing stock, including funding type.

No changes were made to data collection methods in 2017.

MTW Activity #22 – Housing Assistance for School Stability

Status

Active - First included in the 2016 MTW Annual Plan and first implemented in 2016.

Description

Stable, quality schools are a core component of neighborhoods of opportunity. Home from School is a collaborative initiative to support homeless and unstably housed families with children in order to positively impact family and school stability. Student turnover, especially mid school year, creates challenges for schools and for students, both in serving new students and those who remain throughout the year. Residential stability can lead to an uninterrupted school year for students and can prevent fewer school changes that often leave children behind academically.

Seattle Housing Authority provides housing assistance to participating families, using multiple means as available, including prioritizing preference for participating families for admission into units within the selected neighborhood, as well as tenant-based vouchers for participating families, with use limited to the school neighborhood. Partnering service providers provide outreach, enrollment, and pre and post-move support, including services such as housing search, assistance with barriers to leasing such as lack of security deposit and utility arrears, and connecting families to neighborhood resources and services.

Participation in the program is voluntary and priority is given to literally homeless families. Seattle Housing Authority may require that participating families remain within the school neighborhood in order to retain their housing assistance.

Authorization

MTW Agreement: Attachment C.B.1; C.C.1; C.C.2; C.D.1.g; C.D.3; C.D.4

No changes were made to authorizations in 2017.

Agency-wide Housing Assistance for School Stability Strategies

- Housing Assistance for School Stability: Seattle Housing Authority may provide housing assistance for homeless or unstably housed low-income families with children at selected neighborhood schools. (MTW Strategy #22.A.01. Implemented in 2016.)

Impact

Housing Assistance for School Stability strategies support self-sufficiency and housing choice by providing homeless families with housing and supports that allow them to keep their children in the same school.

This activity is on schedule.

Impact	Metric	Baseline (2015)	Benchmark	2017 Results	Benchmark Achieved?
Self sufficiency	SS5: Number of households receiving services to increase self sufficiency	0	5 in 2016, 20 in 2017	16	No
Housing choice	HC5: Number of households able to move to a unit that allows them to continue their child's enrollment at their current neighborhood school (or feeder school)	0	2 in 2016, 20 in 2017	16	No
	HC7: Number of households receiving services to increase housing choice	0	5 in 2016, 20 in 2017	16	No

Seattle Housing Authority did not quite achieve the benchmarks for 2017 for Home from School. While 20 families were referred to the program in 2017, Seattle Housing Authority was unable to continue the application process for four of them due to various issues. However, the program continues to serve new families in 2018 and anticipates meeting the benchmark of 20 families by the end of 2018.

Revisions to benchmarks or metrics

No revisions were made.

Data collection methods

Seattle Housing Authority, Seattle Public Schools, and service partners maintain detailed records of participation in the program, including receipt of housing assistance and supportive services.

No changes were made to data collection methods in 2017.



Not Yet Implemented MTW Activities

MTW Activity #2 – Family Self-Sufficiency Program

Status

Under development - First included in the 1999 MTW Annual Plan. Not yet implemented.

Description

Seattle Housing Authority's Family Self-Sufficiency Program supports residents with services and financial incentives that help them to pursue self-sufficiency in multiple arenas, including employment, education, and moves to market-rate housing. MTW strategies have been designed to help the Family Self-Sufficiency Program to expand its impact by partnering with other agencies, providing incentives for participation, and using local selection criteria, contract terms, and escrow calculation methods.

Authorization

MTW Agreement- Attachment C (C)(5), (C)(11), (E). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-wide Family Self-Sufficiency Program Strategies

Under Development

- FSS escrow accounts: Use local policies for determining escrow calculation, deposits, and withdrawals. (MTW Strategy #2.A.03. Not yet implemented.)
- FSS participation contract: Locally designed contract terms including length, extensions, interim goals, and graduation requirements. (MTW Strategy #2.A.04. Not yet implemented.)
- FSS program incentives: Provide incentives to FSS participants who do not receive escrow deposits, including program offerings for non-heads of household and other members not enrolled in HUD's FSS program. (MTW Strategy #2.A.06. Not yet implemented.)
- FSS selection preferences: Up to 100 percent of FSS enrollments may be selected by local preferences. (MTW Strategy #2.A.07. Not yet implemented.)

Inactive

- Partner with city: Partner with the City of Seattle to share responsibilities and resources for a new integrated FSS program. (MTW Strategy #2.A.01. Implemented in 1998; discontinued in 2000.)
- SJI preference + time limits: Preference for Seattle Jobs Initiative participants coupled with time limits. (MTW Strategy #2.A.02. Implemented in 1998; discontinued in 2000.)
- FSS Program Coordinating Committee: Restructure Program Coordinating Committee (PCC) to better align with program goals and local resources. (MTW Strategy #2.A.05. Not yet implemented.)

Implementation

2017 was an important year for Seattle Housing Authority in developing and restructuring employment and education resources for public housing and Housing Choice Voucher households. Seattle Housing Authority redesigned its employment and education services, formerly known as the Economic Opportunities and Family Self-Sufficiency Programs, into one seamless program, JobLink. In addition, The Workforce Opportunity System (WOS) project ended its three-year pilot and key strategies of this work were integrated into JobLink as well. This redesigned program will launch in 2018 and will include the use of MTW FSS strategies.

Seattle Housing Authority is planning a new streamlined program for employment and education services in 2018 that will allow seamless access to both Family Self-Sufficiency and other programs.

On Hold Activities

MTW Activity #4 – Investment Policies

Status

On Hold - First included in the 1999 MTW Annual Plan. First implemented in 1999. Placed on hold in 2013.

Description

Seattle Housing Authority's MTW investment policies give the agency greater freedom to pursue additional opportunities to build revenue by making investments allowable under Washington State's investment policies in addition to HUD's investment policies. Each year, Seattle Housing Authority assesses potential investments and makes a decision about whether this MTW flexibility will be needed. In 2017 investment flexibility was not needed and all Seattle Housing Authority investments followed HUD policies.

Authorization

MTW Agreement - Attachment C (B)(5). Our MTW authority is used for the strategies described below.

No changes were made to authorizations in 2017.

Agency-wide Investment Policy Strategies

Not Needed in 2017

- Investment policies: Seattle Housing Authority may use Washington State investment policies in lieu of HUD investment policies. (MTW Strategy #4.A.01. Implemented in 1999.)

Reactivation

Seattle Housing Authority annually assesses potential investments to determine which investment policies are most beneficial. MTW alternate investment policies were not needed in 2017. However, Seattle Housing Authority continues to revisit its investment strategies annually in consideration of both the agency's financial plans and available investment opportunities.

MTW Activity #21 –Self-Sufficiency Assessment and Plan

Status

On Hold - First included in the 2015 MTW Annual Plan. Not yet implemented. Placed on hold in 2017.

Description

This activity is intended to increase self-sufficiency by connecting participants to assessments, individualized plans, and community resources designed to help them increase their education, training, and credentials and obtain higher wage jobs.

Authorization

MTW Agreement: Attachment C (C)(2), (C)(4), (D)(1)(c), (D)(1)(c), (D)(3)(b). These authorizations are needed because requiring participation in the self-sufficiency assessment and planning process could alter policies regarding eligibility for admission into the public housing and voucher programs, as well as requirements for interim review processes or continued eligibility.

Agency-wide Strategies

Not Needed in 2017

- SHA may make self-sufficiency assessments and planning mandatory for work-able adults.

Reactivation

Seattle Housing Authority launched the Workforce Opportunity System pilot in 2015 and at the end of 2017 ended the three year pilot program without needing to make participation mandatory. Key strategies from the pilot will be integrated in the new JobLink program in 2018, which will also streamline access to services previously delivered through the Family Self Sufficiency and Economic Opportunities programs. Mandatory participation has not been needed to date but each year Seattle Housing Authority will continue to monitor enrollment and participation and may make changes such as requiring mandatory participation based on those results.



Closed Out Activities

MTW Activity #6 – MTW Block Grant and Fungibility

First implemented with MTW participation in 1999. Closed out in 2011.

While Seattle Housing Authority maintains this important MTW authority, HUD has requested that we no longer report on it as a standalone MTW activity. Previously approved strategies for this activity were:

- MTW Block Grant: Seattle Housing Authority combines all eligible funding sources into a single MTW Block Grant used to support eligible activities.
- Operating reserve: Maintain an operating reserve consistent with sound management practices.
- Utilization goals: HCV utilization defined by use of budget authority.
- Obligation and expenditure timelines: Seattle Housing Authority may establish timelines for the obligation and expenditure of MTW funds.

While the Block Grant, fungibility, operating reserve, and utilization goals continue to be active and critical elements of Seattle Housing Authority's participation as an MTW agency, this activity may be considered closed out as of 2011, which was the last year that Seattle Housing Authority reported on it as a separate activity. HUD no longer allows Seattle Housing Authority to establish timelines for the obligation and expenditure of MTW funds.

MTW Activity #7 - Procurement

First implemented with MTW participation in 1999. Closed out in 2011.

While Seattle Housing Authority's MTW procurement activity was approved by HUD in the 1999 Annual Plan, HUD has since that time taken the position that it is not an allowable MTW activity.

Previously approved strategies for this activity were:

- Construction contract: Locally-designed form of construction contract that retains HUD requirements while providing more protection for Seattle Housing Authority.
- Procurement policies: Adopt alternative procurement system that is competitive, and results in Seattle Housing Authority paying reasonable prices to qualified contractors.
- Wage rate monitoring: Simplified process for monitoring the payment of prevailing wages by contractors.

This activity may be considered closed out as of 2011, which was the last year that Seattle Housing Authority reported on it as a separate activity.

MTW Activity #14 – Related Nonprofits

First approved in the 2004 MTW Annual Plan. Closed out in 2013.

Seattle Housing Authority never implemented this activity, which would have allowed the agency to enter into contracts with related nonprofits. Seattle Housing Authority determined that existing partnership structures were adequate without needing additional MTW authority.

Previously approved strategies for this activity were:

- Related non-profit contracts: Seattle Housing Authority may enter into contracts with any related nonprofit.

This activity may be considered closed out as of 2013. Seattle Housing Authority closed out this activity without implementing it because it found that MTW flexibility was not needed for the activities intended. As a result, there are no outcomes to report.

MTW Activity #16 – Local Asset Management Program

First included in the 2000 MTW Annual Plan and first implemented in 2000.

While Seattle Housing Authority maintains Local Asset Management Program (LAMP) authority, we no longer report on this as an MTW activity at HUD's request.

Previously approved strategies for this activity were:

- Local Asset Management Program: Use asset management principles to optimize housing and services.

Although Seattle Housing Authority continues to operate under the LAMP and this remains an essential element of the agency's participation in the MTW program, this activity may be considered closed out at HUD's request as of 2013. No final outcomes can be reported as the LAMP is a way of doing business rather than a discrete program or activity, and because Seattle Housing Authority continues to implement this activity.

MTW Activity #17 – Performance Standards

First included in the 1999 MTW Annual Plan and first implemented in 1999.

While Seattle Housing Authority maintains alternate performance standards based on MTW participation, this is no longer reported as an MTW activity at HUD's request.

Previously approved strategies for this activity were:

- Local performance standards in lieu of HUD measures: Develop locally relevant performance standards and benchmarks to evaluate the agency performance in lieu of HUD's Public Housing Assessment System (PHAS).

Although Seattle Housing Authority continues to maintain and refine alternate performance standards, this activity may be considered closed out at HUD's request as of 2014. No final outcomes can be reported as performance standards do not result in measurable outcomes, and because Seattle Housing Authority continues to implement this activity.



V. Sources and Uses of Funding

This section describes aspects of Seattle Housing Authority's revenues and expenditures for 2017, local asset management program, and use of MTW single fund authority.

Sources and uses of MTW funds

This is Seattle Housing Authority's fifth report under the new 50900 requirements issued by HUD in 2013. Public housing authorities continue to submit their financial information through the Financial Assessment System - PHA (FASPHA) rather than in the MTW report. The following section provides information on a few aspects of the MTW Block Grant and Replacement Housing Factor (RHF) funding, but is not comprehensive.

Single Fund Flexibility

The MTW Block Grant is a critical element of MTW participation, allowing MTW housing authorities to combine public housing capital, operating, and Housing Choice Voucher subsidies into a single source of funding that they are able to allocate to meet local needs. The following table describes how Seattle Housing Authority used this single fund flexibility in 2017.

Activities that Used Only MTW Single Fund Flexibility

Seattle Housing Authority established a MTW Block Grant Fund under the original MTW Agreement in 1999. Seattle Housing continues to use single fund flexibility under the First Amendment to the MTW Agreement (and now under the Extension Agreement). Funding flexibility supports a variety of low-income housing services and programs and is central to the agency's Local Asset Management Plan (LAMP). Seattle Housing Authority's LAMP includes the whole of its operations, including MTW Block Grant sources and uses.

During 2017, Seattle Housing Authority exercised its MTW flexibility to allocate MTW Block Grant revenues among its housing and administrative programs. This enabled Seattle Housing Authority to further its mission and strategic plan by balancing the mix of housing types, services, capital investment, and administrative support to different low-income housing programs and different groups of low-income residents and voucher participants.

In 2017 Seattle Housing used Block Grant flexibility of \$18.8M to support the following local programs:

- Creation of an economic advancement program for residents and voucher holders that will increase access to living wage employment opportunities and the potential to move out of subsidized housing
- Local low-income housing development and rehabilitation
- Community services for tenants, aging in place activities, recreation and youth educational programs, translation services, and self-sufficiency programs
- Development of a pilot program to serve homeless families of school aged children
- Local low income housing operations, assistance, and capital repairs

While these activities benefit from the flexibility of Seattle Housing Authority's MTW Block Grant, nearly all activities are for Section 8 and Section 9 participants and are not local non-traditional MTW activities as defined in PIH Notice 2011-45. Seattle Housing Authority remains in compliance with the guidance regarding use of funds described in PIH Notice 2011-45.

Local Asset Management Plan

Local Asset Management Plan	
Has the PHA allocated costs within statute during the plan year?	Yes
Has the PHA implemented a local asset management plan (LAMP)?	Yes
Has the PHA provided a LAMP in the appendix?	Yes

Seattle Housing Authority continued to operate under its approved Local Asset Management Plan (LAMP), as first stipulated in the 2010 Plan and in practice since the beginning of its MTW participation. No significant changes were made to Seattle Housing Authority's LAMP during 2017. Indirect service fees (ISF) continue to be updated annually, new programs are added as needed, and on-site maintenance staffing has been implemented at select communities. Seattle Housing Authority's LAMP was submitted with our 2017 MTW Plan and approved by HUD in a letter received February 8, 2017.

In compliance with the First Amendment to the MTW Agreement and the Office of Management and Budget (OMB) Super Circular at Title 2 CFR Part 200 (formerly A-87 requirements), Seattle Housing Authority has set up an ISF. The indirect cost plan is described in more detail in Seattle Housing Authority's LAMP in the appendices of this report. Similar to HUD's COCC and consistent with Circular 200, Seattle Housing Authority created a Central Services Operating Center (CSOC) to represent the fee charges and expenses for indirect costs.

As described previously, Seattle Housing Authority has developed an ISF in compliance with OMB Circular 200 requirements. Seattle Housing Authority's CSOC is more comprehensive than HUD's asset management system, which focuses only on fees for services for public housing properties. Seattle Housing Authority's mission and work is much broader than public housing alone and therefore Seattle Housing Authority's LAMP is also broader. The LAMP includes local housing, for sale activities, limited partnership properties, and other activities not found in traditional HUD programs or public housing agencies. Seattle Housing Authority's ISF is based on anticipated indirect costs serving all direct service programs. In accordance with OMB Circular 200 requirements, the ISF is determined in a reasonable and consistent manner based on total units and leased vouchers. The ISF is a standard fee calculated annually per housing unit and leased voucher charged each month to each program. Please see the LAMP in the appendices to review Seattle Housing Authority's Indirect Cost Plan.

Replacement Housing Factor (RHF) Funding

Seattle Housing Authority receives Replacement Housing Factor (RHF) and Demolition or Disposition Transitional Funding (DDTF) to support the creation of new affordable housing. Since 2001, Seattle Housing Authority has used first and second increment RHF funding to create new affordable housing with several large-scale mixed finance projects at NewHolly, Rainier Vista, High Point, and Yesler Terrace.

In order to combine RHF funding with the MTW Block Grant, Seattle Housing Authority provides an annual update on expenditures of RHF funding in the MTW report. DDTF funding and its associated requirements will replace RHF within the next year. DDTF will not have the same RHF annual reporting requirements and can be used for additional capital needs.

In 2017, the agency received \$105,000 in RHF funding and spent well over this amount on RHF activities that supported the redevelopment of Yesler Terrace and other properties, including predevelopment,

infrastructure, and construction. In 2017 residents moved into the 111 units at Hoa Mai Gardens. In early 2017 financing closed for Red Cedar at 888 East Fir. Both of these projects are part of Yesler Terrace redevelopment.

VI. Administrative Information

This section provides documentation of findings from HUD audits and monitoring visits and certifies compliance with regulations.

Reviews, audits, or inspection issues

Seattle Housing Authority received no findings from HUD audits and monitoring visits that required actions to correct in 2017.

Agency-Directed Evaluations

Seattle Housing Authority is not currently engaged in any agency-wide evaluations of its MTW program.

Certification of Compliance with Regulations

- At least 75 percent of families assisted by Seattle Housing Authority are very low-income.
 - Seattle Housing Authority certifies that it is meeting this statutory objective. HUD, as stated in Section II, will confirm this with PIC data and the information Seattle Housing Authority provides in this report on households served by local, non-traditional programs. According to Seattle Housing Authority's data at the end of 2017, 96 percent of households we served were very low-income.
- Seattle Housing Authority continues to assist substantially the same number of eligible low-income families as would have been served had the amounts (MTW funds) not been combined.
 - Seattle Housing Authority continued to meet this requirement in 2017. Supporting details in HUD's prescribed format may be submitted separately from this report.
- Seattle Housing Authority has maintained a comparable mix of families (by family size as would have been served absent the demonstration).
 - Seattle Housing Authority has maintained a comparable mix of families by family size as would have been served absent the demonstration. While the distribution of family sizes served has shifted since Seattle Housing Authority began its MTW participation, these shifts are largely attributed to non-MTW changes such as housing stock and community demographics, as explained in Section II of this report.



Appendices

The appendices of this report include:

- Appendix A: Housing Stock and Leasing Overview
- Appendix B: New Project-based Voucher Units
- Appendix C: Housing and Applicant Demographics
- Appendix D: Local Asset Management Plan



Appendix A – Housing Stock and Leasing Overview

In the body of this report, we provide statistics on properties and units funded through the MTW Block Grant. However, Seattle Housing Authority owns and manages additional housing stock funded through other sources. In this appendix we provide an overview of Seattle Housing Authority's housing stock and leasing rates for units that are both MTW and non-MTW funded.

Table 1: Changes in housing inventory

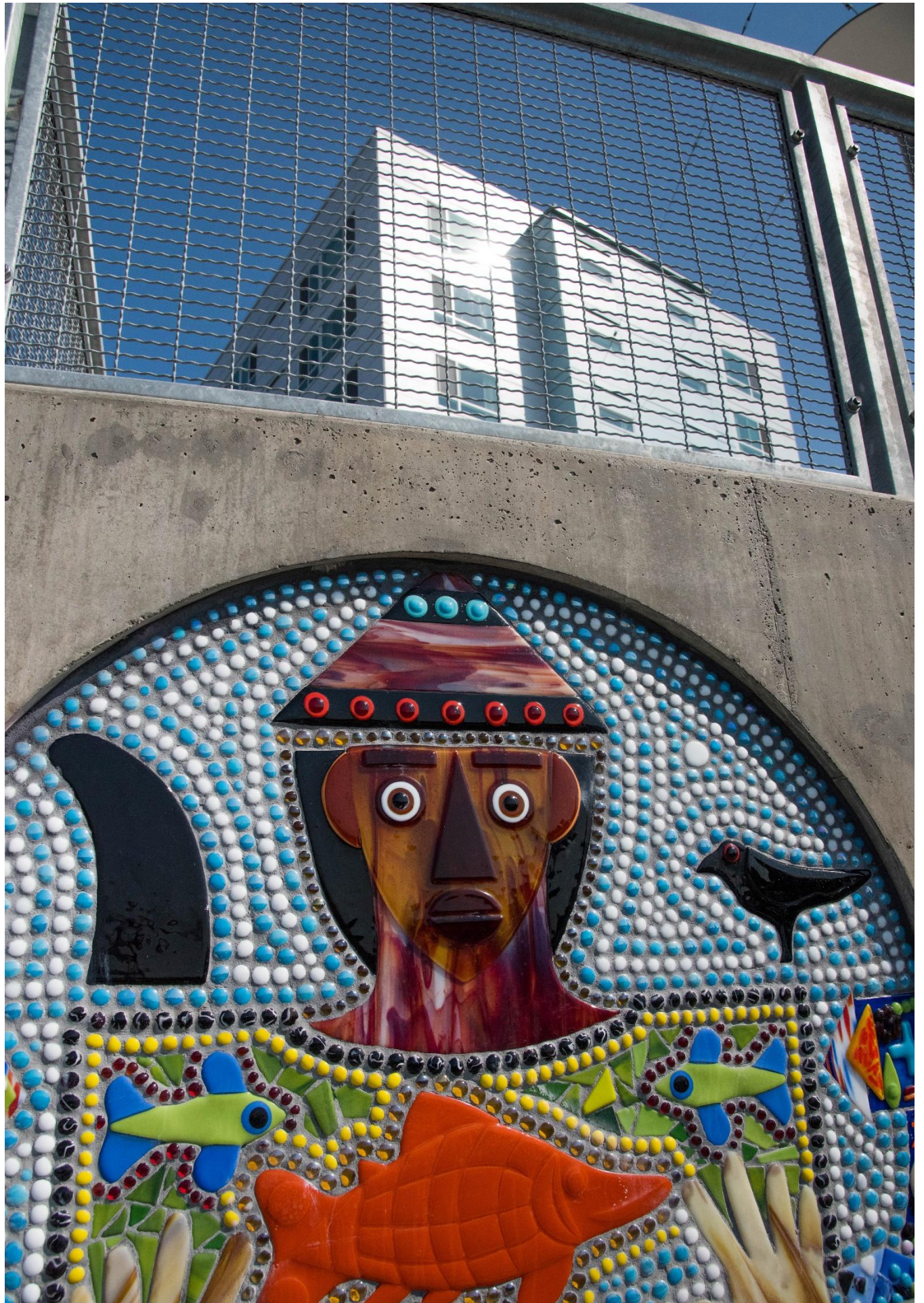
Housing Program	2016 year end	2017 year end
MTW Block Grant-funded Housing		
Housing Choice Voucher	9,666	9,740
<i>Tenant-based</i>	6,201	6,170
<i>Project-based – partner-owned</i>	2,857	2,854
<i>Project-based – SHA-owned</i>	539	633
<i>Program-based – SHA-owned</i>	10	10
<i>Provider-based</i>	59	73
Public Housing	6,040	6,033
<i>SHA-owned *</i>	6,000	5,993
<i>Partner-owned</i>	40	40
MTW Block Grant-funded Housing Total	15,706	15,773
Other HUD-funded Housing		
Housing Choice Vouchers - Special Purpose	782	781
<i>Family Unification Program</i>	200	200
<i>Mainstream Disability</i>	75	75
<i>Housing Conversion</i>	74	36
<i>Veterans Affairs Supportive Housing</i>	433	470
Section 8 New Construction	130	130
Section 8 Moderate Rehab	684	648
Other HUD-funded Housing Total	1,596	1,522
Local Housing		
Seattle Senior Housing Program *	136	136
Tax credit housing (without public housing subsidy)	1,035	1,214
Other affordable housing	716	627
Local Housing Total	1,887	1,977
Managed by SHA for other owners	0	0
Total Housing**	18,640	18,932

*Includes residential units leased to agencies that provide transitional housing or supportive services and units for live-in staff.

**Due to project-basing and program-basing of Housing Choice Vouchers in Local Housing, Total Housing is the sum of all housing units minus Housing Choice Vouchers-MTW Project-based – SHA-owned and Program-based – SHA-owned. Managed by SHA for other owners is also not included in Total Housing.

Table 2: Changes in units leased

HOUSING PROGRAM	2016 year end	2017 year end
Housing Choice Vouchers-MTW	8,815	8,881
Housing Choice Vouchers-Non-MTW	623	675
<i>Family Unification Program</i>	195	183
<i>Mainstream Disability</i>	70	70
<i>Housing Conversion</i>	0	31
<i>Veterans Affairs Supportive Housing</i>	358	391
Low Income Public Housing	5,738	5,645
Section 8 Moderate Rehab	625	600
Section 8 New Construction	129	129
Local Housing*	2,015	2,039
<i>*Does not include local SSHP unit operated by partner; includes residential units leased to agencies that provide transitional housing or supportive services and units for live-in staff. Includes households who are represented in other programs such as HCV Section 8.</i>		



Appendix B – New Project-based Voucher Units

Seattle Housing Authority awarded 241 new project-based vouchers during the year, including 168 MTW vouchers, 37 Veterans Affairs Supportive Housing (VASH) vouchers, and 36 Rental Assistance Demonstration (RAD) vouchers. The projects are described below.

Arion Court						
Project description	<p>Arion Court was previously a Moderate Rehabilitation project. In 2016 the owner, Low Income Housing Institute (LIHI) initiated a Rental Assistance Demonstration (RAD) conversion with the US Department of Housing and Urban Development (HUD), which allows replacement with a project-based voucher contract.</p> <p>Arion Court continues to serve individuals experiencing homelessness with incomes at or below 30 percent Area Median Income. LIHI works with the Veterans Administration for referrals and other agencies to refer eligible homeless individuals.</p> <p>Arion Court offers SRO studio units with small kitchenettes and access to a large community kitchen and room. This building is in Seattle's South Lake Union neighborhood, which provides ease of access to public transit and amenities.</p>					
Total units in property (ies)	Project-based units					
	Studios	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	Total
36	36	0	0	0	0	36

Hoa Mai Gardens						
Project description	<p>Hoa Mai Gardens, owned by Seattle Housing Authority, is the third newly constructed building for at Yesler Terrace. The 70 project based vouchers house families at or below 30 percent Area Median Income. Other units are available to tenants who earn at or below 60 percent Area Median Income.</p> <p>Hoa Mai Gardens offers tenants a community gathering room, central courtyard, advanced ventilation systems for improved air quality, a choice of non-carpeted units for household with respiratory health considerations, parking garage spaces (free to residents), ADA accessible units, security camera and keycard access, bike storage, emergency efficient appliances, LED lighting and low VOC paint, and double and triple pane windows to reduce noise and improve heat conservation. Larger units have in-unit laundry with on-site laundry available to all tenants.</p>					
Total units in property (ies)	Project-based units					
	Studios	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	Total
110	0	27	28	11	4	70

HUD-Veterans Administration Supportive Housing (VASH) in Josephinum Stability Project Housing						
Project description	Catholic Housing Services (CHS) was selected to receive five HUD-VASH project-based vouchers for the Josephinum Apartments, which are located in the heart of Seattle's Belltown neighborhood with a multitude of transit, shopping, and services. The Josephinum Apartments have provided homeless housing for the past two decades and will coordinate with the HUD-VASH team to fill the allocated VASH set asides.					
Total units in property (ies)	Project-based units Studios 1 2 3 4 Total Bedroom Bedrooms Bedrooms Bedrooms					
221	5	0	0	0	0	5

HUD-Veterans Administration Supportive Housing (VASH) in McDermott Place						
Project description	Low Income Housing Institute's (LIHI) McDermott Place was selected to receive an additional allocation of ten HUD-VASH project-based vouchers. This brings the total to 30 HUD-VASH project-based vouchers at McDermott Place, which provides permanent supportive housing and offers VASH case management on-site. McDermott Place is situated near shopping and transit in Seattle's Lake City neighborhood. Each unit is furnished and on-site amenities include a group use kitchen, outdoor area, and community room. Sound Mental Health also offers services at their on-site location.					
Total units in property (ies)	Project-based units Studios 1 2 3 4 Total Bedroom Bedrooms Bedrooms Bedrooms					
75	10	0	0	0	0	10

HUD-Veterans Administration Supportive Housing (VASH) in Seattle Housing Authority Housing						
Project description	Seattle Housing Authority properties were selected to receive HUD-VASH project-based vouchers in 2017. Though SHA properties have experience leasing to tenant-based HUD-VASH participants, this was the first time set-asides have been allocated. The 22 vouchers are located in West Seattle and South Seattle. Vacancies are filled with referrals from the HUD-VASH team.					
Property	Project-based units Studios 1 2 3 4 Total Bedroom Bedrooms Bedrooms Bedrooms					
Longfellow Creek	0	5	0	0	0	5
Wisteria Court	0	5	0	0	0	5
Alder Crest	0	8	0	0	0	8
South Shore Court	0	4	0	0	0	4
Total PBV-HUD VASH in SHA properties						22

Pioneer Human Services – PACT Housing						
Project description	In coordination with King County Behavioral Health & Recovery Division (BHRD) in 2017 20 provider-based vouchers were awarded in conjunction with service funding for Program for Assertive Community Treatment (PACT). PACT is a nationally recognized individual treatment approach that offers intensive services in the community, 24 hours a day. Pioneer Human Services works closely with BHRD and King County’s Coordinated Entry for All to receive referrals for eligible participants, who experience behavioral health issues and are often leaving institutional settings.					
	Pioneer Human Services operates the housing at 1727 Belmont Ave in Seattle’s Capitol Hill neighborhood, which receives the housing subsidy from Seattle Housing Authority. Pioneer Human Services also operates and provides PACT services as contracted with BHRD in accordance with Washington State PACT standards.					
Total units in property (ies)	Project-based units					
	Studios	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	Total
30	20	0	0	0	0	20

Plymouth on First Hill						
Project description	Plymouth on First Hill opened in October 2017 and is operated as permanent supportive housing for homeless individuals with critical medical challenges by Plymouth Housing Group. This project is fully integrated into King County’s Coordinated Entry for All system. Residents are able to receive wraparound support including on-site medical and behavioral health care from Harborview Medical Center staff.					
	The building is located in Seattle’s First Hill neighborhood, which offers easy access to many amenities including being within steps to medical facilities and public transportation. The studio units come furnished for all tenants and residents have access to community rooms and programming.					
Total units in property (ies)	Project-based units					
	Studios	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	Total
80	77	0	0	0	0	77

Seattle Housing Authority Special Portfolio Single Family Dwelling						
Project description	One single family dwelling was identified to receive project-based voucher subsidy. This is a 6 bedroom unit in West Seattle, which enables a large family to receive subsidy in a unit size not typical for the project-based voucher program.					
Total units in property (ies)	Project-based units <div> <div>Studios</div> <div>1 Bedroom</div> <div>2 Bedrooms</div> <div>3 Bedrooms</div> <div>4 + Bedrooms</div> <div>Total</div> </div>					
1110	0	0	0	0	1	1

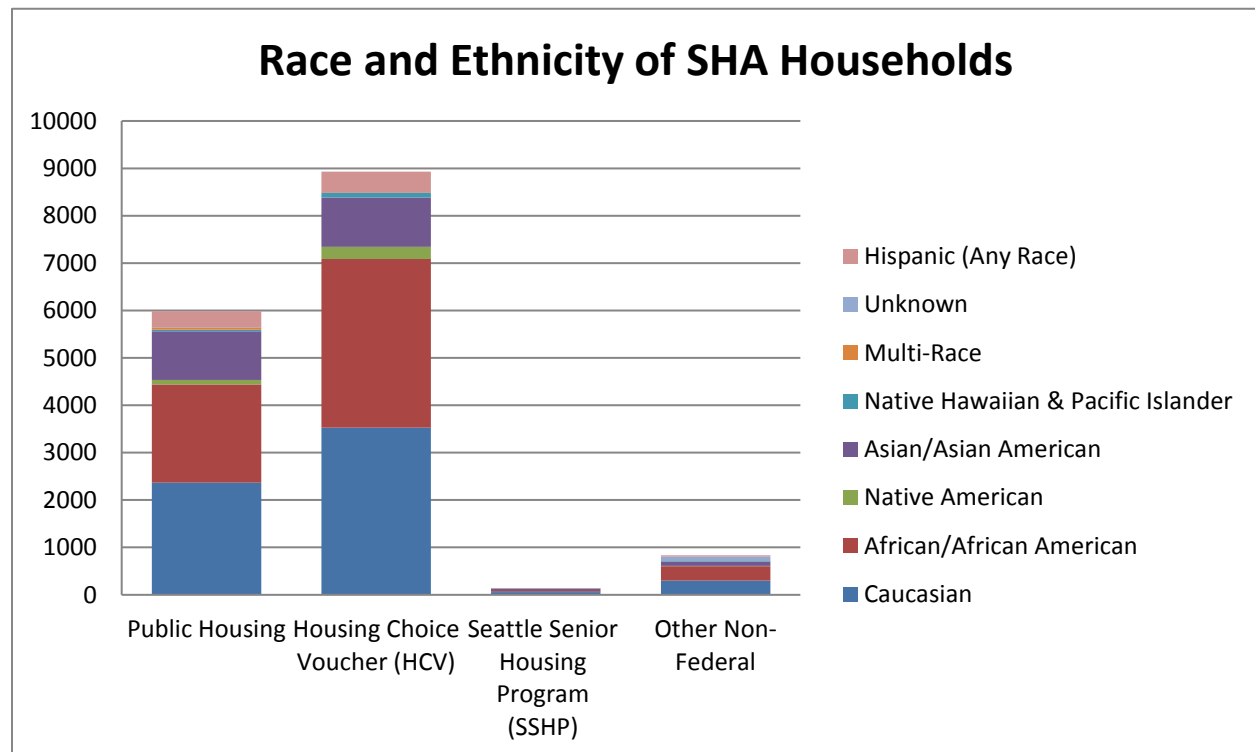


Appendix C – Household and Applicant Demographics

This appendix provides data on changes in the number and characteristics of households housed in Seattle and applicants to Seattle Housing Authority. Unless otherwise noted, data represents year-end information (December 31, 2017). Variations in totals from table to table indicate detailed data is missing for a few households. Additional data notes are provided at the end of this appendix.

Current Seattle Housing Authority Households

Race & Ethnicity



All Households as of 12/31/2017									
Program	Caucasian	African/African American	Native American	Asian/Asian American	Native Hawaiian & Pacific Islander	Multi-Race	Unknown	Total	Hispanic (Any Race)
Public Housing	2369	2072	93	1028	35	45	3	5645	343
Housing Choice Voucher (HCV)	3530	3556	261	1039	97	1	2	8486	445
SSHP	57	20	3	53	0	1	1	135	4
Other Non-Federal	302	302	9	87	10	3	91	804	28
Total	6258	5950	366	2207	142	50	97	15070	820
Percent of Total	42%	39%	2%	15%	1%	0%	1%	100%	5%

Public Housing Residents (as of 12/31/2017)								
Community Type	Caucasian	African/American	Native American	Asian/Asian American	Native Hawaiian & Pacific Islander	Multi-Race	Unknown	Total
Garden Communities	75	608	12	327	8	6		1036
High-Rises	1455	887	58	488	13	29	3	2933
Mixed Income Partnership Units	16	36	1	4				57
Scattered Sites	14	31		3		1		49
SSHP-LIPH	162	358	13	85	12	5		635
Townhouses	634	112	9	114		4		873
	13	40		7	2			62
Total	2369	2072	93	1028	35	45	3	5645
Percent of Total	42%	37%	2%	18%	1%	1%	0%	100%

Housing Choice Voucher Program Participants (as of 12/31/2017)								
Program	Caucasian	African/American	Native American	Asian/Asian American	Native Hawaiian & Pacific Islander	Multi-Race	Unknown	Total
HCV Tenant-based	1713	2113	114	516	49			4505
HCV Project-based	1484	1279	112	369	40			3284
S8 Mod Rehab	277	134	32	148	8			599
S8 New Construction	56	30	3	6		1	2	98
Total	3530	3556	261	1039	97	1	2	8486
Percent of Total	42%	42%	3%	12%	1%	0%	0%	100%

Seattle Senior Housing Program (non-LIHP) (as of 12/31/2017)								
Program	Caucasian	African/American	Native American	Asian/Asian American	Native Hawaiian & Pacific Islander	Multi-Race	Unknown	Total
SSHP	57	20	3	53		1	1	135
Percent of Total	42%	15%	2%	39%	0%	1%	1%	100%

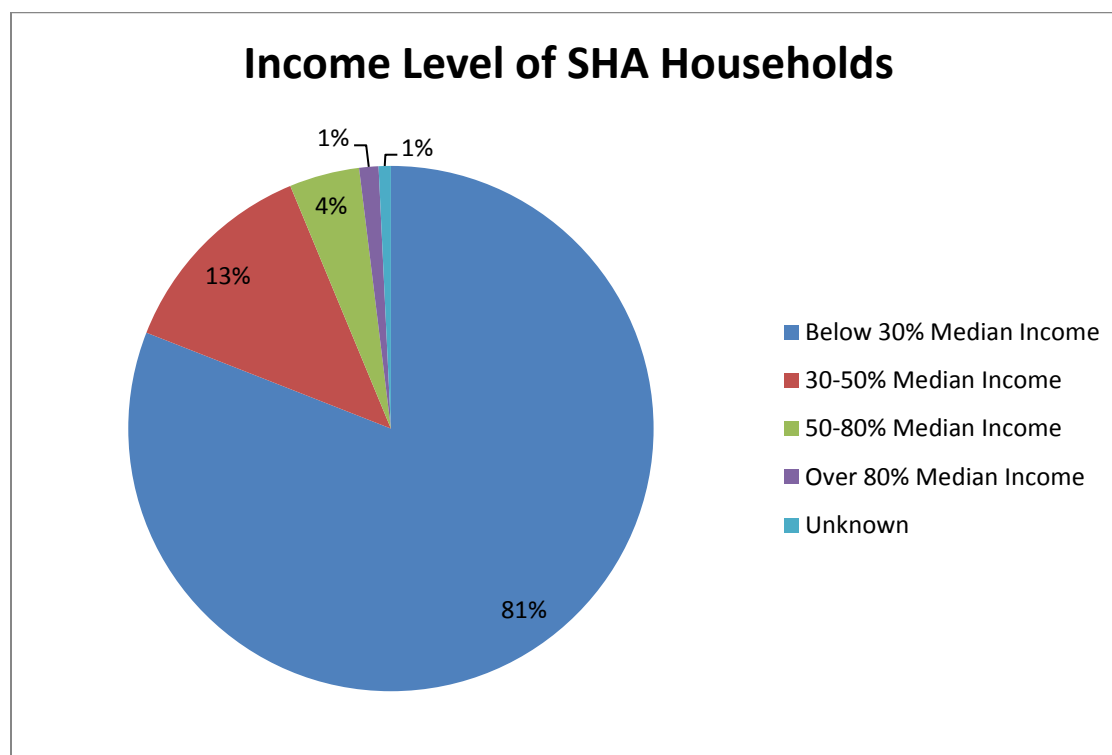
Other Non-Federal Program Residents (as of 12/31/2017)								
Program	Caucasian	African/African American	Native American	Asian/Asian American	Native Hawaiian & Pacific Islander	Multi-Race	Unknown	Total
HOPE VI Tax Credit 7 Special Portfolio SHA	23	168	3	36	2	2	18	252
Yesler Terrace Special Portfolio Outside Managed	8	48	2	13		1	4	75
	261	51	3	36	7		7	365
Total	302	302	9	87	10	3	91	804
Percent of Total	38%	38%	1%	11%	1%	0%	11%	100%

Ethnicity - Hispanic/Non-Hispanic (as of 12/31/2017)			
Program	Hispanic	Non-Hispanic	Total
Low Income Public Housing	343	5302	5645
SSHP-LIPH	833	40	873
HCV Tenant-Based	224	4281	4505
HCV Project-Based	182	3102	3284
Section 8 Mod Rehab	32	567	599
Section 8 New Construction	7	90	98
Seattle Senior Housing Program (non-LIPH)	4	128	135
Other Non-Federal	28	695	804
Total Households	820	14165	15070
Percent of Total	5%	94%	100%

Excludes households whose ethnicity is unknown.

Income distribution as a percent of median income

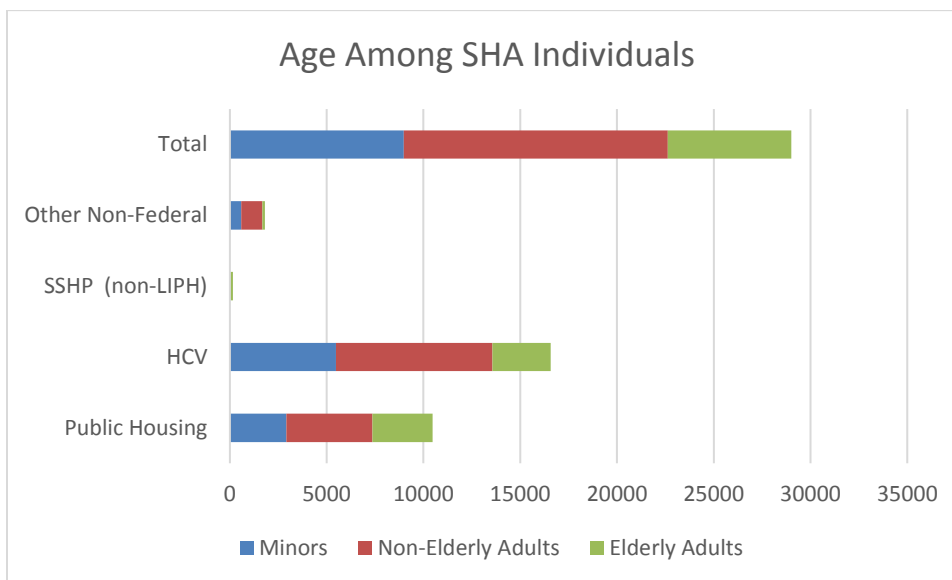
Median Income Levels for the Seattle-Bellevue Area (Effective 12/1/2017)			
Family Size	30% Median	50% Median	80% Median
Single Individual	\$20,200.00	\$33,600.00	\$53,760.00
Family of Two	\$23,050.00	\$38,400.00	\$61,440.00
Family of Three	\$25,950.00	\$43,200.00	\$69,120.00
Family of Four	\$28,800.00	\$48,000.00	\$76,800.00
Family of Five	\$31,150.00	\$51,850.00	\$82,960.00
Family of Six	\$33,450.00	\$55,700.00	\$89,120.00
Family of Seven	\$35,750.00	\$59,550.00	\$95,280.00
Family of Eight	\$38,050.00	\$63,400.00	\$101,440.00



All Households (as of 12/31/2017)						
Program	Below 30% Median Income	30-50% Median Income	50-80% Median Income	Over 80% Median Income	Unknown	Total
Public Housing	4640	718	233	54	0	5645
HCV	7235	989	231	31	0	8486
SSHP	116	18	1	0	0	135
Other Non-Federal Total	208	203	186	94	113	804
Total	12199	1928	651	179	113	15070
Percent of Total	81%	13%	4%	1%	1%	100%

Distribution of Household Annual Income (as of 12/31/2017)						
Program	Below 30% Median Income	30-50% Median Income	50-80% Median Income	Over 80% Median Income	Unknown	Total
Public Housing	4640	718	233	54	0	5645
SSHP-LIPH	702	140	29	2		873
HCV Tenant- Based	3689	657	146	13		4505
HCV Project- Based	2898	294	77	15		3284
Section 8 Mod Rehab	554	34	8	3		599
Section 8 New Construction	94	4	0	0		98
SSHP Non-LIHP	116	18	1	0		135
Total	12199	1928	651	179	113	15070
Percent of Total	81%	13%	4%	1%	1%	100%

Total population by age group (minors, adults and elderly)



All Residents (as of 12/31/2017)				
Program	Minors	Non-Elderly Adults	Elderly Adults	Total Individuals
Public Housing	2920	4441	3118	10479
HCV	5473	8099	3008	16580
SSHP (non-LIPH)	0	13	137	150
Other Non-Federal	589	1093	126	1808
Total	8982	13646	6389	29017
Percent of Total	31%	47%	22%	100%

Public Housing Residents (as of 12/31/2017)					
Community Type	Minors	Non-Elderly Adults	Elderly Adults	Total Individuals	Elderly > 70
Garden Communities	1608	1553	394	3555	220
High-Rises	39	1541	1632	3212	785
Mixed Income	60	59	10	129	5
Partnership Units	78	103	10	191	3
Scattered Sites	951	995	162	2108	58
SSHP-LIPH	0	49	902	951	661
Townhouses	184	141	8	333	6
Total	2920	4441	3118	10479	1738
Percent of Total	28%	42%	30%	100%	17%

Excludes occupants of employee and agency units.

Housing Choice Voucher Participants (as of 12/31/2017)					
Program	Minors	Non-Elderly Adults	Elderly Adults	Total Individuals	Elderly > 70
HCV Tenant-based	3456	4550	1646	9652	849
HCV Project-based	1959	3006	1081	6046	516
S8 Mod Rehab	58	477	245	780	110
S8 New Construction	0	66	36	102	12
Total	5473	8099	3008	16580	1487
Percent of Total	33%	49%	18%	100%	9%

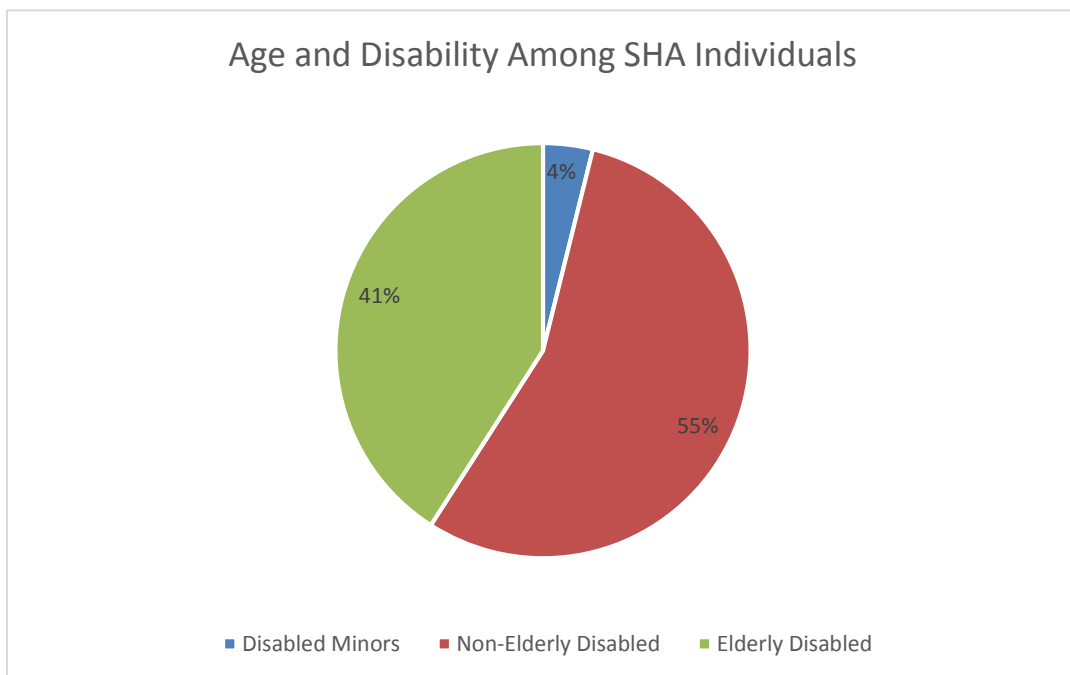
Excludes port-outs and SSHP voucher holders; includes port-ins.

Seattle Senior Housing Program Residents (non-LIHP) (as of 12/31/2017)					
Program	Minors	Non-Elderly Adults	Elderly Adults	Total Individuals	Elderly > 70
SSHP	0	13	137	150	99
Percent of Total	0%	9%	91%	100%	66%

Other Non-Federal Program Residents (as of 12/31/2017)					
Program	Minors	Non-Elderly Adults	Elderly Adults	Total Individuals	Elderly > 70
HOPE VI Tax Credit	348	468	41	857	16
Special Portfolio SHA	61	72	9	142	2
Yesler Terrace	33	90	20	143	11
Special Portfolio Outside Managed	147	463	56	666	N/A
Total	589	1093	126	1808	29
Percent of Total	33%	60%	7%	100%	2%

Excludes households represented in other housing programs, such as Housing Choice Voucher or Low-Income Public Housing. Excludes households whose age is unknown.

People with Disabilities



All Residents (as of 12/31/2017)					
Program	Disabled Minors	Non-Elderly Disabled	Elderly Disabled	Total Disabled	Total Individuals
Public Housing	61	1520	1269	2850	10479
HCV	273	3273	2286	5832	16580
SSHP	0	3	9	12	150
Other Non-Federal	5	38	17	60	1808
Total	339	4834	3581	8754	29017
Percent of Total	4%	55%	41%	100%	

Public Housing Residents (as of 12/31/2017)					
Community Type	Disabled Minors	Non-Elderly Disabled	Elderly Disabled	Total Disabled	Total Individuals
Garden Communities	32	176	209	417	3555
High-Rises	0	1134	852	1986	3212
Mixed Income	1	11	8	20	129
Partnership Units	3	6	3	12	191
Scattered Sites	24	147	69	240	2108
SSHP-LIPH	0	39	125	164	951
Townhouses	1	7	3	11	333
Total	61	1520	1269	2850	10479
Percent of Total	1%	15%	12%	272%	

Housing Choice Voucher Participants (as of 12/31/2017)					
Community Type	Disabled Minors	Non-Elderly Disabled	Elderly Disabled	Total Disabled	Total Individuals
HCV Tenant-based	183	1615	1337	3135	9652
HCV Project-based	88	1315	727	2130	6046
S8 Mod Rehab	2	281	194	477	780
S8 New Construction	0	62	28	90	102
Total	273	3273	2286	5832	16580
Percent of Total	2%	20%	14%	35%	

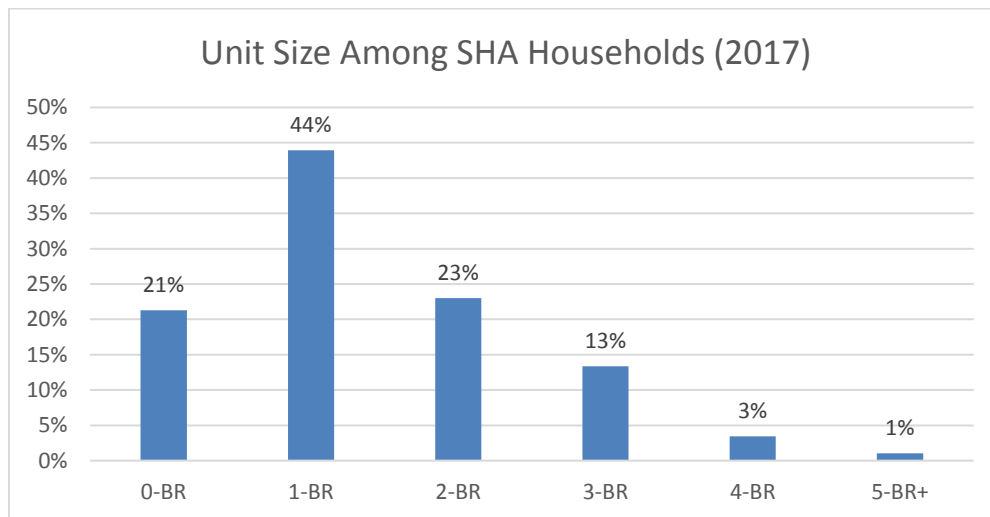
Excludes port-outs and SSHP voucher holders; includes port-ins

Seattle Senior Housing Program Participants (non-LIPH) (as of 12/31/2017)					
	Disabled Minors	Non-Elderly Disabled	Elderly Disabled	Total Disabled	Total Individuals
Total	0	3	9	12	150
Percent of Total	0%	3%	7%	10%	

Other Non-Federal Program Residents (as of 12/31/2017)					
Community Type	Disabled Minors	Non-Elderly Disabled	Elderly Disabled	Total Disabled	Total Individuals
HOPE VI Tax Credit 7	5	15	6	26	857
Special Portfolio SHA	0	6	0	6	142
Yesler Terrace	0	2	11	13	143
Special Portfolio Outside Managed	N/A	15	N/A	15	666
Total	5	38	17	60	1808
Percent of Total	0%	2%	1%	3%	

Excludes households represented in other housing programs, such as Housing Choice Vouchers or Low Income Public Housing units.

Households Served in Seattle by Unit Size



Households served in Seattle by unit size at year end – comparing Seattle Housing Authority's first year of MTW (1999), the prior year (2016), and the current year (2017)								
Program	Year	0-Br	1-Br	2-Br	3-Br	4-Br	5+-Br	Total
Low Income Public Housing	1999	257	3,158	1,470	935	231	36	6,087
	2016	801	2,249	881	708	181	37	4,857
	2017	800	3015	924	694	173	39	4772
Seattle Senior Housing Low-Income Public Housing	2016	2	794	85	-	-	-	881
	2017	2	784	87	0	0	0	873
Housing Choice Voucher Tenant- & Project-based Assistance	1999	250	1,117	1,079	872	279	82	3,679
	2016	2,139	2,102	1,910	1,091	181	101	7,524
	2017	2232	2110	1961	1074	304	108	7789
Section 8 New Construction	1999	10	141	0	0	0	0	151
	2016	0	98	0	0	0	0	98
	2017	0	98	0	0	0	0	98
Seattle Senior Housing Program (non-LIPH)	1999	161	913	85	0	0	0	1,159
	2016	0	125	10	0	0	0	135
	2017		125	10				135
Other Non-Federal	1999	0	0	0	0	0	0	0
	2016	40	155	291	152	21	5	664
	2017	45	223	349	163	20	4	804
Total	1999	678	5,329	2,634	1,807	510	118	11,076
	2016	2,982	5,523	3,177	1,951	383	143	14,159
	2017	3079	6355	3331	1931	497	151	14471
Distribution of Unit sizes	1999	6.1%	48.1%	23.8%	16.3%	4.6%	1.1%	100.0%
	2016	21.1%	39.0%	22.4%	13.8%	2.7%	1.0%	100.0%
	2017	21.3%	43.9%	23.0%	13.3%	3.4%	1.0%	100.0%

Excludes Mod Rehab units. Not all units include MTW funds.

Average Length of Participation by Housing and Household Type

Elderly/Disabled Households (elderly or disabled head of household as of 12/31/2017)							
Program	Households	Average Number of Years	2 Years or Less	2-5 Years	5-10 Years	10-20 Years	20 Years or More
Public Housing	4154	10	18%	11%	32%	24%	15%
HCV Tenant-based	2849	10	19%	12%	22%	35%	11%
HCV Project-based	2244	4	46%	21%	21%	11%	1%
Section 8 Mod Rehab	488	8	34%	21%	17%	18%	10%
Section 8 New Construction	96	9	24%	20%	21%	19%	17%
SSHP	129	4	53%	19%	16%	11%	2%
Other Non-Federal	122	6	35%	10%	25%	24%	2%
Total	10082	7	26%	14%	26%	24%	10%

Excludes port-outs, includes port-ins.

Work-Likely Households (non-elderly, non-disabled head of household as of 12/31/2017)							
Program	Households	Average Number of Years	2 Years or Less	2-5 Years	5-10 Years	10-20 Years	20 Years or More
Public Housing	1491	8	26%	10%	33%	25%	6%
HCV Tenant-based	1656	7	31%	15%	25%	25%	4%
HCV Project-based	1040	4	47%	25%	23%	5%	0%
Section 8 Mod Rehab	111	7	27%	24%	22%	18%	9%
Section 8 New Construction	2	2	50%	50%	0%	0%	0%
SSHP	5	6	40%	0%	40%	20%	0%
Other Non-Federal	607	5	40%	14%	27%	14%	2%
Total	4912	6	34%	16%	27%	19%	4%

Excludes port-outs, includes port-ins.

All Households (as of 12/31/2017)							
Program	Households	Average Number of Years	2 Years or Less	2-5 Years	5-10 Years	10-20 Years	20 Years or More
Public Housing	5645	9	20%	11%	32%	24%	13%
HCV Tenant-based	4505	9	23%	13%	23%	36%	9%
HCV Project-based	3284	4	46%	22%	22%	9%	0%
Section 8 Mod Rehab	599	7	33%	22%	18%	18%	10%
Section 8 New Construction	98	5	24%	20%	20%	18%	16%
SSHP	134	5	52%	18%	17%	11%	1%
Other Non-Federal	729	5	39%	13%	26%	15%	2%
Total	14994	7	29%	15%	26%	22%	8%

Excludes port-outs, includes port-ins.

Waiting List Applicant Demographics

Public Housing Applicants (as of 12/31/2017)							
Household Size	Caucasian	African/African American	Native American	Asian & Pacific Islander	Multi-Race	Unknown	Total
1	1578	1072	93	592	61	270	3666
2	219	264	25	342	9	52	911
3	72	160	6	76	5	35	354
4	40	103	5	65	2	13	228
5	28	88		20		5	141
6+	23	109	2	13	2	11	160
Total	1960	1796	131	1108	79	386	5460
Percent of Total	36%	33%	2%	20%	1%	7%	100%

SSHP-LIPH Applicants (as of 12/31/2017)							
Household Size	Caucasian	African/African American	Native American	Asian & Pacific Islander	Multi-Race	Unknown	Total
1	1200	470	37	0	25	118	1850
2	125	49	3	0	3	20	200
3	3	5	1	0		1	10
4	1	2		0			3
5							0
6+							0
Total	1329	526	41	0	28	139	2063
Percent of Total	64%	25%	2%	0%	1%	7%	100%

Housing Choice Voucher Applicants (as of 12/31/2017)							
Household Size	Caucasian	African/African American	Native American	Asian & Pacific Islander	Multi-Race	Unknown	Total
1	829	703	70	156	89	37	1884
2	246	423	27	81	65	1	843
3	173	265	21	75	42		576
4	129	188	6	56	28		407
5	78	114	3	32	11		238
6+	56	116	6	27	9	1	215
Total	1511	1809	133	427	244	39	4163
Percent of Total	36%	43%	3%	10%	6%	1%	100%

Section 8 New Construction Applicants (as of 12/31/2017)							
Household Size	Caucasian	African/African American	Native American	Asian & Pacific Islander	Multi-Race	Unknown	Total
1	173	100	8	0	12	23	316
2	15	6	1	0		2	24
3		1					1
4							0
5							0
6+							0
Total	188	107	9	0	12	25	341
Percent of Total	55%	31%	3%	0%	4%	7%	100%

SSHP (non-LIPH) Applicants (as of 12/31/2017)							
Household Size	Caucasian	African/African American	Native American	Asian & Pacific Islander	Multi-Race	Unknown	Total
1	98	95	10	223	4	20	450
2	12	7	2	192		9	222
3		2		6			8
4				3			3
5							0
6+							0
Total	110	104	12	424	4	29	683
Percent of Total	16%	15%	2%	62%	1%	4%	100%

Income distribution as a percent of median income

Applicant Household Annual Incomes (as of 12/31/2017)					
Program	Below 30% Median Income	30-50% Median Income	50-80% Median Income	Over 80% Median Income	Total
Public Housing	4673	635	105	25	5438
SSHP-LIPH	2003	340	111	13	2467
HCV Tenant-Based	3893	211	36	3	4143
Section 8 New Construction	345	33	9	0	387
SSHP	624	48	11	0	683
Total	11538	1267	272	41	13118
Percent of Total	88%	10%	2%	0%	100%

Additional data notes – the following notes apply to all tables within this appendix:

- Low Income Public Housing excludes occupants of employee and agency units.
- Housing Choice Vouchers excludes households that have left Seattle Housing Authority's jurisdiction; excludes households using vouchers in the SSHP program; and includes households that have entered Seattle Housing Authority's jurisdiction.
- Other Non-Federal excludes occupants of units managed by Seattle Housing Authority for other owners and excludes households in these properties that are represented in other data tables (such as tenant-based Housing Choice Vouchers).
- Length of Participation data excludes households in properties managed by SHA but not SHA owned and households whose original move-in date is temporarily unavailable. Work-likely households are defined as a head of household adult who is over 18 and under age 62 and not disabled. Elderly and Disabled households are defined as a head of household who is 62 or over and/or is disabled.
- Applicant data does not include applicants for Special Portfolio and HOPE VI Tax Credit units.
- SHA first began reporting on multi-racial households as a category in 2013.



Appendix D – Local Asset Management Plan

I. Introduction

The First Amendment to the Amended and Restated Moving to Work (MTW) Agreement (“First Amendment”) allows the Seattle Housing Authority (SHA or the Authority) to develop a local asset management program (LAMP) for its Public Housing Program. The agency is to describe its LAMP in its next annual MTW plan, to include a description of how it is implementing project-based management, budgeting, accounting, and financial management and any deviations from HUD’s asset management requirements. Under the First Amendment, SHA agreed its cost accounting and financial reporting methods would comply with the federal Office of Management and Budget (OMB) Super Circular at Title 2 CFR Part 200 (formerly A-87 requirements) and agreed to describe its cost accounting plan as part of its LAMP, including how the indirect service fee is determined and applied. The materials herein fulfill SHA’s commitments.

II. Framework for SHA’s Local Asset Management Program

A. Mission and Values

SHA was established by the City of Seattle under State of Washington enabling legislation in 1939. SHA provides affordable housing to about 26,000 low-income people in Seattle, through units SHA owns and operates or for which SHA serves as the general partner of a limited partnership and as managing agent, and through rental assistance in the form of tenant-based, project-based, and provider-based vouchers. SHA is also an active developer of low-income housing to redevelop communities and to rehabilitate and preserve existing assets. SHA operates according to the following Mission and Values:

Our Mission

Our mission is to enhance the Seattle community by creating and sustaining decent, safe and affordable living environments that foster stability and increase self-sufficiency for people with low-income.

Our Values

As stewards of the public trust, we pursue our mission and responsibilities in a spirit of service, teamwork, and respect. We embrace the values of excellence, collaboration, innovation, and appreciation.

SHA owns and operates housing in neighborhoods throughout Seattle. These include the four large family communities of NewHolly and Rainier Vista in Southeast Seattle, High Point in West Seattle, and Yesler Terrace in Central Seattle. In the past fifteen years, SHA has undertaken redevelopment or rehabilitation of all four family communities and 21 of our public housing high-rise buildings, using mixed financing with low-income housing tax credit limited partnerships. SHA is the general partner in nineteen limited partnerships.

SHA has approximately 560 employees and a total projected operating and capital budget of \$268 million for Calendar Year 2017.

B. Overarching Policy and Cost Objectives

SHA's mission and values are embraced by our employees and ingrained in our policies and operations. They are the prism through which we view our decisions and actions and the cornerstone to which we return in evaluating our results. In formulating SHA's Local Asset Management Program (LAMP) our mission and values have served as the foundation of our policy/cost objectives and the key guiding principles that underpin SHA's LAMP.

Consistent with requirements and definitions of 2 CFR 200, SHA's LAMP is led by three overarching policy/cost objectives:

- ◆ ***Cost Effective Affordable Housing:*** To enhance the Seattle community by creating, operating, and sustaining decent, safe, and affordable housing and living environments for low-income people, using cost-effective and efficient methods.
- ◆ ***Housing Opportunities and Choice:*** To expand housing opportunities and choice for low-income individuals and families through creative and innovative community partnerships and through full and efficient use of rental assistance programs.
- ◆ ***Resident Financial Security and/or Self-Sufficiency:*** To promote financial security or economic self-sufficiency for low-income residents, as individual low-income tenants are able, through a network of training, employment services, and support.

C. Local Asset Management Program – Eight Guiding Principles

Over time and with extensive experience, these cost objectives have led SHA to define an approach to our LAMP that is based on the following principles:

- (1) ***In order to most effectively serve low-income individuals seeking housing, SHA will operate its housing and housing assistance programs as a cohesive whole, as seamlessly as feasible.***

We recognize that different funding sources carry different requirements for eligibility and different rules for operations, financing, and sustaining low-income housing units. It is SHA's job to make funding and administrative differences as invisible to tenants/participants as we can, so low-income people are best able to navigate the housing choices and rental assistance programs SHA offers. We also consider it SHA's job to design our housing operations to bridge differences among programs/fund sources, and to promote consolidated requirements, wherever possible. It is also incumbent on us to use our own and MTW authority to minimize administrative inefficiencies from differing rules and to seek common rules, where possible, to enhance cost effectiveness, as well as reduce the administrative burden on tenants.

This principle has led to several administrative successes, including use of a single set of admissions and lease/tenant requirements for Low Income Public Housing and project-based Housing Choice Voucher tenants in the same property. Similarly, we have joint funder agreements for program and

financial reporting and inspections on low-income housing projects with multiple local and state funders.

An important corollary is SHA's involvement in a community-wide network of public, non-profit, and for-profit housing providers, service and educational providers, and coalitions designed to rationalize and maximize housing dollars – whatever the source – and supportive services and educational/training resources to create a comprehensive integrated housing + services program city and county-wide. So, not only is SHA's LAMP designed to create a cohesive whole of SHA housing programs, it is also intended to be flexible enough to be an active contributing partner in a city-wide effort to provide affordable housing and services for pathways out of homelessness and out of poverty.

(2) *In order to support and promote property performance and financial accountability at the lowest appropriate level, SHA will operate a robust project and portfolio-based budgeting, management, and reporting system of accountability.*

SHA has operated a property/project-based management, budgeting, accounting, and reporting system for the past decade. Our project-based management systems include:

- Annual budgets developed by on-site property managers and reviewed and consolidated into portfolio requests by area or housing program managers;
- Adopted budgets at the property and/or community level that include allocation of subsidies, where applicable, to balance the projected annual budget – this balanced property budget becomes the basis for assessing actual performance;
- Monthly property-based financial reports comparing year-to-date actual to budgeted performance for the current and prior years;

Quarterly portfolio reviews are conducted with the responsible property manager(s) and the area or housing program managers, with SHA's Asset Management Team.

SHA applies the same project/community based budgeting system and accountability to its non-federal programs.

(3) *To ensure best practices across SHA's housing portfolios, SHA's Asset Management Team provides the forum for review of housing operations policies, practices, financial performance, capital requirements, and management of both SHA and other housing authorities and providers.*

A key element of SHA's LAMP is the Asset Management Team (AM Team) comprised of upper and property management staff from housing operations, asset management, property services, executive, legal, finance and budget, community services, communications, and rental assistance. This interdisciplinary AM Team meets weekly throughout the year and addresses:

- All critical policy and program issues facing individual properties or applying to a single or multiple portfolios, from rent policy to smoke-free buildings to rules for in-home businesses;

- Portfolio reviews and follow-up, where the team convenes to review with property management staff how well properties are operating in relation to common performance measures (e.g. vacancy rates; turnover time); how the property is doing in relation to budget and key reasons for deviations; and property manager projections and/or concerns about the future;
- Annual assessment of capital repair and improvement needs of each property with property managers and area portfolio administrators in relation to five year projections of capital preservation needs. This annual process addresses the capital needs and priorities of individual properties and priorities across portfolios; and.
- Review and preparation of the annual MTW Plan and Report, where key issues for the future are identified and discussed, priorities for initiatives to be undertaken are defined, and where evaluation of MTW initiatives are reviewed and next steps determined.

The richness and legitimacy of the AM Team processes result directly from the diverse Team composition, the open and transparent consideration of issues, the commitment of top management to participate actively on the AM Team, and the record of follow-up and action on issues considered by the AM Team.

(4) To ensure that the Authority and residents reap the maximum benefits of cost-effective economies of scale, certain direct functions will be provided centrally.

Over time, SHA has developed a balance of on-site capacity to perform property manager, resident manager and basic maintenance/handyperson services, with asset preservation services performed by a central capacity of trades and specialty staff. SHA's LAMP reflects this cost-effective balance of on-site and central maintenance services for repairs, unit turnover, landscaping, pest control, and asset preservation as direct costs to properties. Even though certain maintenance functions are performed by central trade crews, the control remains at the property level, as it is the property manager and/or area or program manager who calls the shots as to the level of service required from the "vendor" – the property services group – on a unit turnover, site landscaping, and maintenance and repair work orders. Work is not performed at the property by the central crews without the prior authorization of the portfolio manager or his/her designee. And all services are provided on a fee for service basis.

Similarly, SHA has adopted procurement policies that balance the need for expedient and on-site response through delegated authorization of certain dollar levels of direct authority for purchases, with Authority-wide economies of scale and conformance to competitive procurement procedures for purchases/work orders in excess of the single bidder levels. Central procurement services are part of SHA's indirect services fee.

(5) SHA will optimize direct service dollars for resident/tenant supportive services by waiving indirect costs that would otherwise be borne by community service programs and distributing the associated indirect costs to the remaining direct cost centers.

A large share of tenant/resident services are funded from grants and foundations and these funds augment local funds to provide supportive services and self-sufficiency services to residents. In

order to optimize available services, the indirect costs will be supported by housing and housing choice objectives.

There are a myriad of reasons that led SHA to this approach:

- Most services are supported from public and private grants and many of these don't allow indirect cost charges as part of the eligible expenses under the grant;
- SHA uses local funds from operating surpluses to augment community services funding from grants; these surpluses have derived from operations where indirect services have already been charged;
- SHA's community services are very diverse, from recreational activities for youth to employment programs to translation services. This diversity makes a common basis for allocating indirect services problematic.
- Most importantly, there is a uniform commitment on the part of housing and housing choice managers to see dollars for services to their tenants/participants maximized. There is unanimous agreement that these program dollars not only support the individuals served, but serve to reduce property management costs they would experience from idle youth and tenants struggling on their own to get a job.

(6) SHA will achieve administrative efficiencies, maintain a central job cost accounting system for capital assets, and properly align responsibilities and liability by allocating capital assets/improvements to the property level only upon completion of capital projects.

Development and capital projects are managed through central agency units and can take between two and five or more years from budgeting to physical completion. Transfer of fixed assets only when they are fully complete and operational best aligns responsibility for development and close-out vs. housing operations.

The practice of transferring capital assets when they are complete and operational, also best preserves clear lines of accountability and responsibility between development and operations; preserves the relationship and accountability of the contractor to the project manager; aligns with demarcations between builders risk and property insurance applicability; protects warranty provisions and requirements through commissioning; and, maintains continuity in the owner's representative to ensure all construction contract requirements are met through occupancy permits, punch list completion, building systems commissioning, and project acceptance.

(7) SHA will promote service accountability and incorporate conservation incentives by charging fees for service for selected central services.

This approach, rather than an indirect cost approach, is preferred where services can be differentiated on a clear, uniform, and measureable basis. This is true for information technology services and for Fleet Management services. The costs of information technology services are distributed based on numbers of personal computers, "thin clients", and printers; the fees

differentiate the operating costs of these equipment items and provide incentives for shared equipment use for printers and use of the lower cost thin client computers.

The Fleet service fee encompasses vehicle insurance, maintenance, and replacement. Fuel consumption is a direct cost to send a direct conservation signal. The maintenance component of the fleet charge is based on a defined maintenance schedule for each vehicle given its age and usage. The replacement component is based on expected life of each vehicle in the fleet, a defined replacement schedule, and replacement with the most appropriate vehicle technology and conservation features.

(8) *SHA will use its MTW block grant authority and flexibility to optimize housing opportunities provided by SHA to low-income people in Seattle.*

SHA flexibility to use MTW Block Grant resources to support its low-income housing programs is central to our Local Asset Management Program (LAMP). SHA will exercise our contractual authority to move our MTW funds and project cash flow among projects and programs as the Authority deems necessary to further our mission and cost objectives. MTW flexibility to allocate MTW Block Grant revenues among the Authority's housing and administrative programs enables SHA to balance the mix of housing types and services to different low-income housing programs and different groups of low-income residents. It enables SHA to tailor resource allocation to best achieve our cost objectives and therefore maximize our services to low-income residents and applicants having a wide diversity of circumstances, needs, and personal capabilities. As long as the ultimate purpose of a grant or program is low income housing, it is eligible for MTW funds.

III. SHA's Local Asset Management Program (LAMP) Implementation

A. Comprehensive Operations

Consistent with the guiding principles above, a fundamental driver of SHA's LAMP is its application comprehensively to the totality of SHA's MTW program. SHA's use of MTW resource and regulatory flexibility and SHA's LAMP encompass our entire operations; accordingly:

- We apply our indirect service fees to all our housing and rental assistance programs;
- We expect all our properties, regardless of fund source, to be accountable for property-based management, budgeting, and financial reporting;
- We exercise MTW authority to assist in creating management and operational efficiencies across programs and to promote applicant and resident-friendly administrative requirements for securing and maintaining their residency; and,
- We use our MTW block grant flexibility across all of SHA's housing programs and activities to create the whole that best addresses our needs at the time.

SHA's application of its LAMP and indirect service fees to its entire operations is more comprehensive than HUD's asset management system. HUD addresses fee for service principally at the low income

public housing property level and does not address SHA's comprehensive operations, which include other housing programs, business activities, and component units.

B. Project-based Portfolio Management

We have reflected in our guiding principles above the centrality of project/property-based and program-based budgeting, management, reporting and accountability in our asset management program and our implementing practices. We also assign priority to our multi-disciplinary central Asset Management Team in its role to constantly bring best practices, evaluations, and follow-up to inform SHA's property management practices and policies. Please refer to the section above to review specific elements of our project-based accountability system.

A fundamental principle we have applied in designing our LAMP is to align responsibility and authority and to do so at the lowest appropriate level. Thus, where it makes the most sense from the standpoints of program effectiveness and cost efficiency, the SHA LAMP assigns budget and management accountability at the property level. We are then committed to providing property managers with the tools and information necessary for them to effectively operate their properties and manage their budgets.

We apply the same principle of aligning responsibility and accountability for those services that are managed centrally, and, where those services are direct property services, such as landscaping, decorating, or specialty trades work, we assign the ultimate authority for determining the scope of work to be performed to the affected property manager.

In LIPH properties, we budget subsidy dollars with the intent that properties will break even. Over the course of the year, we gauge performance at the property level in relation to that aim. When a property falls behind, we use our quarterly portfolio reviews to discern why and agree on corrective actions and then track their effectiveness in subsequent quarters. We reserve our MTW authority to move subsidy and cash flow among our LIPH properties based on our considered assessment of reasons for surplus or deficit operations. We also use our quarterly reviews to identify properties whose performance warrants placement on a "watch" list.

C. Cost Allocation Approach

Classification of Costs

Under 2 CFR 200, there is no universal rule for classifying certain costs as either direct or indirect under every accounting system. A cost may be direct with respect to some specific service or function, but indirect with respect to the Federal award or other final cost objective. Therefore, it is essential that each item of cost be treated consistently in like circumstances, either as a direct or an indirect cost. Consistent with 2 CFR 200 cost principles, SHA has identified all of its direct costs and segregated all its costs into pools, as either a direct or an indirect cost pool. We have further divided the indirect services pool to assign costs as "equal burden" or hard housing unit based, as described below.

Cost Objectives

2 CFR 200 defines cost objective as follows: *Cost objective means a function, organizational subdivision, contract, grant, or other activity for which cost data are needed and for which costs are incurred.* The Cost Objectives for SHA's LAMP are the three overarching policy/cost objectives described earlier:

- Cost Effective Affordable Housing;
- Housing Opportunities and Choice; and,
- Resident Financial Security and/or Self-Sufficiency

Costs that can be identified specifically with one of the three objectives are counted as a direct cost to that objective. Costs that benefit more than one objective are counted as indirect costs. Attachment 1 is a graphic representation of SHA's LAMP, with cost objectives, FDS structure, and SHA Funds.

SHA Direct Costs

2 CFR 200 defines direct costs as follows: *Direct costs are those that can be identified specifically with a particular final cost objective.* SHA's direct costs include but are not limited to:

- Contract costs readily identifiable with delivering housing assistance to low-income families.
- Housing Assistance Payments, including utility allowances, for vouchers
- Utilities
- Surface Water Management fee
- Insurance
- Bank charges
- Property-based audits
- Staff training
- Interest expense
- Information technology fees
- Portability administrative fees
- Rental Assistance department costs for administering Housing Choice Vouchers including inspection activities
- Operating costs directly attributable to operating SHA-owned properties
- Fleet management fees
- Central maintenance services for unit or property repairs or maintenance
- Central maintenance services include, but are not limited to, landscaping, pest control, decorating and unit turnover
- Operating subsidies paid to mixed income, mixed finance communities
- Community Services department costs directly attributable to tenants services
- Gap financing real estate transactions

- Acquisition costs
- Demolition, relocation and leasing incentive fees in repositioning SHA-owned real estate
- Homeownership activities for low-income families
- Leasing incentive fees
- Certain legal expenses
- Professional services at or on behalf of properties or a portfolio, including security services
- Extraordinary site work
- Any other activities that can be readily identifiable with delivering housing assistance to low-income families
- Any cost identified for which a grant award is made. Such costs will be determined as SHA receives grants
- Direct Finance staff costs
- Direct area administration staff costs

SHA Indirect Costs

2 CFR 200 defines indirect costs as *those (a) incurred for a common or joint purpose benefiting more than one cost objective, and (b) not readily assignable to the cost objectives specifically benefitted, without effort disproportionate to the results achieved*. SHA's indirect costs include, but are not limited to:

- Executive
- Communications
- Most of Legal
- Development
- Finance
- Purchasing
- Human Resources
- Housing Finance and Asset Management
- Administration staff and related expenses of the Housing Operations and Rental Assistance Departments that cannot be identified to a specific cost objective.

SHA Indirect Service Fee – Base, Derivation and Allocation

SHA has established an Indirect Services Fee (IS; ISF) based on anticipated indirect costs for the fiscal year. Per the requirements of 2 CFR 200, the ISF is determined in a reasonable and consistent manner based on total units and leased vouchers. Thus, the ISF is calculated as a per-housing-unit or per-leased-voucher fee per month charged to each program. Please see Attachment 2 to review SHA's Indirect Services Fee Plan.

Equitable Distribution Base

According to 2 CFR 200, *the distribution base may be (1) total direct costs (excluding capital expenditure), (2) direct salaries and wages, or (3) another base which results in an equitable distribution.* SHA has found that unit count and leased voucher is an equitable distribution base when compared to other potential measures. Testing of prior year figures has shown that there is no material financial difference between direct labor dollar allocations and unit allocations. Total units and leased vouchers are a far easier, more direct and transparent, and more efficient method of allocating indirect service costs than using direct labor to distribute indirect service costs. Direct labor has other complications because of the way SHA charges for maintenance services. Using housing units and leased vouchers removes any distortion that total direct salaries and wages might introduce. Units leased vouchers is an equitable distribution base which best measures the relative benefits.

Derivation and Allocation

According to 2 CFR 200, where a grantee agency's indirect costs benefit its major functions in varying degrees, such costs shall be accumulated into separate cost groupings. Each grouping shall then be allocated individually to benefitted functions by means of a base which best measures the relative benefits. SHA divides indirect costs into two pools, "Equal Burden" costs and "Hard Unit" costs. Equal Burden costs are costs that equally benefit leased voucher activity and hard, existing housing unit activity. Hard Unit costs primarily benefit the hard, existing housing unit activity.

Before calculating the per unit indirect service fees, SHA's indirect costs are offset by designated revenue. Offsetting revenue includes 10 percent of the MTW Capital Grant award, a portion of the developer fee paid by limited partnerships, limited partnership management fees, laundry revenue, dividend or savings from insurance companies and purchasing card discounts for early payment, commuting reimbursements from employees and a portion of Solid Waste's outside revenue.

A per unit cost is calculated using the remaining net indirect costs divided by the number of units and the number of leased vouchers. For the 2017 budget, the per unit per month (PUM) cost for housing units is \$50.66 and for leased vouchers is \$19.53.

Annual Review of Indirect Service Fee Charges

SHA will annually review its indirect service fee charges in relation to actual indirect costs and will incorporate appropriate adjustments in indirect service fees for the subsequent year, based on this analysis.

D. Differences – HUD Asset Management vs. SHA Local Asset Management Program

Under the First Amendment, SHA is allowed to define costs differently than the standard definitions published in HUD's Financial Management Guidebook pertaining to the implementation of 24 CFR 990. SHA is required to describe in this MTW Annual Plan differences between our Local Asset Management Program and HUD's asset management program. Below are several key differences, with additional detail reflected in Attachment 3 to this document:

- SHA determined to implement an indirect service fee that is much more comprehensive than HUD's asset management system. HUD's asset management system and fee for service is limited in focusing only on a fee for service at the Low Income Public Housing (LIPH) property

level. SHA's LAMP is much broader and includes local housing and other activities not found in traditional HUD programs. SHA's LAMP addresses the entire SHA operation.

- SHA has defined its cost objectives at a different level than HUD's asset management program. SHA has defined three cost objectives under the umbrella of the MTW program, which is consistent with the issuance of the CFDA number and with the First Amendment to the MTW Agreement. HUD defined its cost objectives at the property level and SHA defined its cost objectives at the program level. Because the cost objectives are defined differently, direct and indirect costs will be differently identified, as reflected in our LAMP.
- HUD's rules are restrictive regarding cash flow between projects, programs, and business activities. SHA intends to use its MTW resources and regulatory flexibility to move its MTW funds and project cash flow among projects without limitation and to ensure that our operations best serve our mission, our LAMP cost objectives, and ultimately the low-income people we serve.
- HUD intends to maintain all maintenance staff at the property level. SHA's LAMP reflects a cost-effective balance of on-site and central maintenance services for repairs, unit turnover, landscaping, and asset preservation as direct costs to properties.

HUD's asset management approach records capital project work-in-progress quarterly. SHA's capital projects are managed through central agency units and can take between two and five or more years from budgeting to physical completion. Transfer of fixed assets only when they are fully complete and operational best aligns responsibility for development and close-out vs. housing operations.

Please consult Attachment 3 for additional detailed differences between HUD's asset management program and SHA's LAMP. However, detailed differences for SHA's other housing programs are not provided.

Balance Sheet Accounts

Most balance sheet accounts will be reported in compliance with HUD's Asset Management Requirements and some will deviate from HUD's requirements, as discussed below:

- Cash
- Petty Cash
- Prepaid Expenses and Deferred Charges
- Materials Inventory
- Contract Retention
- Other Post-Employment Benefits (OPEB) Liability
- Pension Liability or Asset
- Deferred Inflows and Deferred Outflows

SHA will deviate from HUD's asset management requirements by reporting the above account balances as assets or liabilities maintained centrally. They will not be reported by AMP or program. Through years of practice, we believe that maintaining these accounts centrally has proven to be the most cost effective and least labor-intensive method. Although these balance sheet accounts are proposed to be maintained centrally, the related expenses will continue to be reported as an expense to the appropriate program, department and AMP-based income and expense statement. It is important to

note that maintaining the above balance sheet accounts centrally will not diminish SHA's obligation or ability to effectuate improved and satisfactory operations and to develop and adhere to its asset management plan. This is consistent with the new Catalog of Federal Domestic Assistance (CFDA) number for the MTW program.

Enclosures:

Attachment 1: Structure of SHA's LAMP and FDS Reporting

Attachment 2: 2017 Indirect Services Fee Plan

Attachment 3: Matrix – HUD vs. SHA Indirect and Direct Costs

Appendix A – Attachment 1

SHA Cost Objectives, FDS Reporting Structure, and SHA Funds

Local Asset Management Program

Use MTW flexibility to operate Housing and Assistance Programs as seamlessly as feasible

Direct Cost Objectives									
FDS Columns	MTW	Indirect Services Costs	AMPs	Other Housing	Other Business Activities	LP Component Units	MF Developments & Home Ownership	Other Housing	Other Business Activities
Funds	Capital WIP unallocated costs, IT capital projects, 100 480	400	Various including LIPH portion of LP CUs	104 122 127 137 193/216/228 351 591	150 190 194 195 198 199 450 470	19 LPs LIPH portion reported in AMPs	700, 704-709, 711-712, 718-736, 738-747	139 168	125 CS grants

Fund Name	Fund Number
General	100
Seattle Senior Housing	104
Bayview Tower	127
Ref 37	137
Housing Choice Vouchers	139
Housing Assistance Payments	150
Mod Rehab	168
Local Fund	190
Local Housing Program	193/216/228
House Ownership	194
SHA Land and Parks	195
Development	198
Wakefield	199
Othello	352
Indirect Services Costs	400
Impact Property Services	450
Impact Property Management	470
MTW Fund	480
Baldwin	591
MF Developments & Home Ownership	700-747

Appendix A – Attachment 2

Indirect Services Fee Allocation Plan CY 2017 Budget

Organizational Unit	2017 Estimated Budget	Equal Burden Units	Hard Units
Executive	\$2,252,511	\$2,252,511	
Asset Management	425,816		425,816
Finance	3,620,205	3,620,205	
Housing Operations	1,502,991		1,502,911
Rental Assistance	134,336	134,336	
Human Resources (allocated based on staff)	2,008,713	748,746	1,259,967
Prior Year Adjustment	(1,063,724)	(1,063,724)	
Total	\$8,880,848	\$5,692,074	\$3,188,774
Percentage	100%	64%	36%
Less Indirect Revenues	(3,150,288)		
Remaining Overhead to allocate PUM	\$5,730,560	\$3,672,934	\$2,057,626
Units		15,669	5,508
PUM cost		\$19.53	\$31.13
PUM cost to Equal Burden Units			\$19.53
PUM fee to Hard Units			\$50.66

INDIRECT REVENUES	2017
	Budget
Capital Grant Revenue	\$1,163,400
10% of Developer Fee Cash	73,800
Management Fees Paid by Others	1,367,216
Laundry Fee Revenue	110,383
Insurance Dividend	115,000
City Benefit Reimbursement	70,489
Solid Waste Services	250,000
Total Fixed Revenues	\$3,150,288

UNIT SUMMARY	Total
Housing Units	5,508
Total Vouchers	10,374
Leased Vouchers @ 94.6% utilization	9,818
Total Mod Rehab	685
Divide by two for work equivalency	343
Total Units	15,669

INDIRECT SERVICE FEES	Indirect Services Rate		
	Equal Burden Units	\$	19.53
	Hard Units	\$	50.66

Development Number/Fund Number	Units	2017 Budget
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Low Income Public Housing

00001 Yesler Terrace	270	164,171
00009 Jefferson Terrace	299	181,804
00013 Olive Ridge	105	63,844
00015 Bell Tower	120	72,965
00017 Denny Terrace	221	134,377
00023 Westwood Heights	130	79,045
00037 Jackson Park Village	41	24,930
00038 Cedarvale Village	24	14,593
00031 Tri-Court	87	52,899
00041 Holly Court	66	40,131
00050 Scattered Sites A	59	35,874
00051 Scattered sites A-5+	121	73,573
00052 Scattered sites B	60	36,482
00053 Scattered sites B-5+	112	68,100
00054 Scattered sites C	71	43,171
00055 Scattered sites C-5+	128	77,829
00056 Scattered sites D	87	52,899
00057 Scattered sites D-5+	73	44,387
00081 Longfellow Creek	30	18,241

00082 Wisteria Court	20	12,161
00086 High-Rise Rehab Phase I LP	704	428,059
00087 Seattle High-Rise LP	687	417,116
00088 Seattle High-Rise Rehab III LP	586	356,920
00092 Seattle Senior Hsg North	231	140,457
00093 Seattle Senior Hsg South	138	83,910
00094 Seattle Senior Hsg Central	246	149,578
00095 Seattle Senior Hsg City Funded	279	169,647
Other Housing Programs		
00104 - Seattle Senior Housing Program	68	40,131
00137 - Ref 37	6	3,648
00139 - Rental Assistance	9,818	2,301,494
00168 - Mod Rehab	343	80,287
00193 - Local Housing Program	328	199,437
00352 Othello	96	58,371
00591 Baldwin	15	9,121
Total	15,669	5,729,652

LIMITED PARTNERSHIP UNITS AND RESTRICTED FEE UNITS

Excludes units managed by outside property management firms and non-profit partners.

Includes limited partnership units and properties with a restricted management fees.

Fund – Description	Units	CY 17 Mgt Fee
00079 Desdemona (NewHolly)	219	144,540
00080 Escallonia (Rainier Vista)	184	121,440
00089 Tamarack (Rainier Vista)	83	54,780
00083 High Point North	344	227,040
00085 High Point South	256	168,960
000xx Rainier Vista III Northeast	118	77,880
000xx Lake City Village	86	56,760
TOTAL HOPE VI LIMITED PARTNERSHIPS	1,290	851,400
121 Shirley Bridge		
127 Bayview Tower (mgt. fees limited by HUD)	100	55,535
729 Ritz Apartments	30	19,652
735 Alder Crest Apartments	36	18,317
292 Douglas Apartments	44	19,742
739 Leschi House	69	45,540
738 Kebero	103	67,980
743 Raven	83	54,780
744 Hoa Mai	110	36,630
746 Holly Park I Redevelopment	305	197,640
TOTAL RESTRICTED FEE	880	515,816
Total	2,170	1,367,216

Appendix A – Attachment 3

Matrix: HUD's Tables 7.1 and 7.2 Definition of Direct and Indirect/Fee Expense vs. SHA Local Asset Management Program (LAMP)

Low Income Public Housing	
Fee/Indirect Expense per HUD	Fee/Indirect Expense per SHA LAMP
<p>* Actual personnel costs for individuals assigned to the following positions:</p> <p>Executive Direct and support staff</p> <p>Human resources staff</p> <p>Regional managers</p> <p>Corporate legal staff</p> <p>Finance, accounting and payroll staff</p> <p>IT staff including help desk</p> <p>Risk management staff</p> <p>Centralized procurement staff</p> <p>Quality control staff, including QC inspections</p> <p>* Purchase and maintenance of COCC arrangements, equipment, furniture and services</p> <p>* Establishment, maintenance, and control of an accounting system adequate to carryout accounting/bookkeeping for the AMPs</p>	<p>* Actual personnel costs for individuals assigned to the following positions:</p> <p>Executive Direct and support staff</p> <p>Human resources staff</p> <p>Corporate legal staff</p> <p>Finance, accounting and payroll staff, except non-supervisory accounting staff (considered front line bookkeepers)</p> <p>Separate IT Fee for Service</p> <p>Risk management staff</p> <p>Centralized procurement staff</p> <p>* Purchase and maintenance of Indirect Services ("IS") arrangements, equipment, furniture and services</p> <p>* Establishment, maintenance, and control of an accounting system adequate to carryout accounting/bookkeeping for the AMPs</p>

- * Office expense including office supplies, computer expense, bank charges, telephone, postage, utilities, fax and office rent related to the general maintenance and support of COCC
- * The cost of insurance related to COCC buildings, equipment, personnel to include property, auto, liability E&O and casualty.
- * Work with auditors for audit preparation and review of audit costs associated with the COCC.
- * Central servers and software that support the COCC (not projects)
- * Commissioners' stipend and non-training travel.
- * Commissioners' training that exceed HUD standards
- * The cost of a central warehouse, unless, with HUD approval, the Agency can demonstrate that the costs of maintaining this warehouse operation, if included with the costs of the goods purchased, are less than what the project would otherwise incur if the goods were obtained by on-site staff.

- * Office expense including office supplies, computer expense, bank charges, telephone, postage, utilities, fax and office rent related to the general maintenance and support of IS.
- * Work with auditors for audit preparation and review of audit costs associated with the IS.
- * Central servers and software that support the IS (not projects)
- * Commissioners' stipend and non-training travel.
- * Commissioners' training that exceed HUD standards
- * The cost of a central warehouse, unless, with HUD approval, the Agency can demonstrate that the costs of maintaining this warehouse operation, if included with the costs of the goods purchased, are less than what the project would otherwise incur if the goods were obtained by on-site staff.

Direct Expenses per HUD	
*	Actual personnel costs of staff assigned directly to AMP sites
*	Repair & maintenance costs, including Centralized maintenance provided under fee for service Maintenance supplies Contract repairs e.g. heating, painting, roof, elevators on site Make ready expenses, including painting and repairs, cleaning, floor replacements, and appliance replacements; Preventive maintenance expenses, including repairs and maintenance, as well as common area systems repairs and maintenance Maintenance contracts for elevators, boilers, etc. Other maintenance expenses, Section 504 compliance, pest
*	Utility costs
*	Costs related to maintaining a site-based office, including IT equipment and software license allocations.
*	Advertising costs specific to AMP, employees or other property
*	PILOT
*	All costs of insurance for the AMP

Direct Expenses per SHA LAMP	
*	Actual personnel costs of staff assigned directly to AMP sites
*	Area management site costs allocated to AMPs w/in area
*	Direct procurement staff
*	Repair & maintenance costs, including Centralized maintenance provided under fee for service (IPS) Maintenance supplies Contract repairs e.g. heating, painting, roof, elevators on site Make ready expenses, including painting and repairs, cleaning, floor replacements, and appliance replacements; Preventive maintenance expenses, including repairs and maintenance, as well as common area systems repairs and maintenance Maintenance contracts for elevators, boilers, etc. Other maintenance expenses, Section 504 compliance, pest
*	Utility costs
*	Costs related to maintaining a site-based office, including IT equipment and software license allocations.
*	Advertising costs specific to AMP, employees or other property
*	PILOT
*	All costs of insurance for the AMP

- * Professional services contracts for audits, rehab and inspections specific to the project.
- * Property management fees, bookkeeping fees, and asset management fees.
- * Certain litigation costs.
- * Audit costs (may be prorated)
- * Vehicle expense
- * Staff recruiting and background checks, etc.
- * Family self-sufficiency staff and program costs
- * Commissioners' training up to a limited amount as provided by HUD

- * Professional services contracts for audits, rehab and inspections specific to the project.
- Inspector costs are allocated to the projects as a direct cost.
- * Property management fees, bookkeeping fees, and asset management fees.
 - * Certain litigation costs.
 - *
 - * Separate Fleet Fee for Service
 - * Staff recruiting and background checks, etc.
 - * Family self-sufficiency staff and program costs
 - * Commissioners' training up to a limited amount as provided by HUD
 - * Building rent

Housing Choice Vouchers

Fee/Indirect Expense per HUD	Fee/Indirect Expense per SHA LAMP
<ul style="list-style-type: none"> * A share of the personnel costs for HCV staff assigned to the COCC. * Establish, maintain and control an accounting system adequate to carryout accounting/bookkeeping for the HCV program * General maintenance of HCV books and records * Supervision by COCC management staff of overall HCV program operations * Procurement * Preparation of monitoring reports for internal and external use. * Preparation, approval and distribution of HCV payments, not HAP * COCC staff training, and ongoing certifications related to HCV program. * Travel for COCC staff for training, etc. related to HCV program * COCC staff attendance at meetings with landlords, tenants, others regarding planning, budgeting, and program review. * Work with auditors and audit preparation. * Indirect cost allocations imposed on the HCV program by a higher level of local government. * Hiring, supervision and termination of front-line HCV staff. * Preparation and submission of HCV program budgets, financial reports, etc. to HUD and others. * Monitoring and reporting on abandoned property as required by states. * Investment and reporting on HCV proceeds. 	<ul style="list-style-type: none"> * A share of the personnel costs for HCV staff assigned to Indirect Services ("IS"). Some executive staff costs allocated to IS. * Establish, maintain and control an accounting system adequate to carryout accounting/bookkeeping for the HCV program * General maintenance of HCV books and records * Supervision by IS management staff of overall HCV program operations * Centralized Procurement staff * Preparation of monitoring reports for internal and external use. * Preparation, approval and distribution of HCV payments, not HAP * IS staff training, and ongoing certifications related to HCV program. Certifications are an ongoing cost of keeping trained staff. * Travel for IS staff for training, etc. related to HCV program * IS staff attendance at meetings with landlords, tenants, others regarding planning, budgeting, and program review. * Work with auditors and audit preparation. * Indirect cost allocations imposed on the HCV program by a higher level of local government. * Hiring, supervision and termination of front-line HCV staff. * Preparation and submission of HCV program budgets, financial reports, etc. to HUD and others. * Monitoring and reporting on abandoned property as required by states. * Investment and reporting on HCV proceeds.

<ul style="list-style-type: none"> * Storage of HCV records and adherence to federal and/or state records retention requirements.
Fee/Indirect Expense per HUD
<ul style="list-style-type: none"> * Development and oversight of office furniture, equipment and vehicle replacement plans. * Insurance costs for fidelity or crime and dishonesty coverage for COCC employees based on a reasonable allocation method. * Commissioners' stipend and non-training travel. * Commissioners' training that exceed HUD standards

<ul style="list-style-type: none"> * Storage of HCV records and adherence to federal and/or state records retention requirements.
Fee/Indirect Expense per SHA LAMP
<ul style="list-style-type: none"> * Development and oversight of office furniture, equipment and vehicle replacement plans. * Insurance costs for fidelity or crime and dishonesty coverage for IS employees based on a reasonable allocation method. * Commissioners' stipend and non-training travel. * Commissioners' training that exceed HUD standards

Direct Expenses per HUD
<ul style="list-style-type: none"> * Actual personnel costs of staff assigned directly to HCV program * Travel & training for HCV program personnel * Prep, approval and distribution of HCV HAP disbursement * Legal fees directly related, including tenant and landlord enforcement. * Background reports on tenants, landlords, etc. * Bank charges * Telephone * Advertising costs specific to HCV, including applicants, landlords and employees * Postage for HAP checks. * HCV office furniture and IT equipment * Service Agreements re furniture * Insurance for auto and equipment * Insurance for fidelity or crime for front-line staff. * Direct costs of collection activities related to fraud. Indirect cost of fraud collections are a management fee cost. * Preparing and maintaining tenant and landlord files, etc. including unit inspections.

Direct Expenses per SHA LAMP
<ul style="list-style-type: none"> * Actual personnel costs of staff assigned directly to HCV program * Travel & training for HCV program personnel * Prep, approval and distribution of HCV HAP disbursement * Legal fees directly related, including tenant and landlord enforcement. * Background reports on tenants, landlords, etc. * Bank charges * Telephone * Advertising costs specific to HCV, including applicants, landlords and employees * Postage for HAP checks. * HCV office furniture and IT equipment * Service Agreements re furniture * Insurance for auto and equipment * Insurance for fidelity or crime for front-line staff. * Direct costs of collection activities related to fraud. Indirect cost of fraud collections are a management fee cost. * Preparing and maintaining tenant and landlord files, etc. including unit inspections.

<ul style="list-style-type: none"> * Public relations expenses related to maintaining positive relationships between the local community, landlords and tenants.
Direct Expenses per HUD
<ul style="list-style-type: none"> * Professional service contracts related to direct services for HCV. * Commissioners' training expenses up to a limited amount provided by HUD

<ul style="list-style-type: none"> * Public relations expenses related to maintaining positive relationships between the local community, landlords and tenants. Communications department charges for this.
Direct Expenses per SHA LAMP
<ul style="list-style-type: none"> * Professional service contracts related to direct services for HCV. * Commissioners' training expenses up to a limited amount provided by HUD * Building rent



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