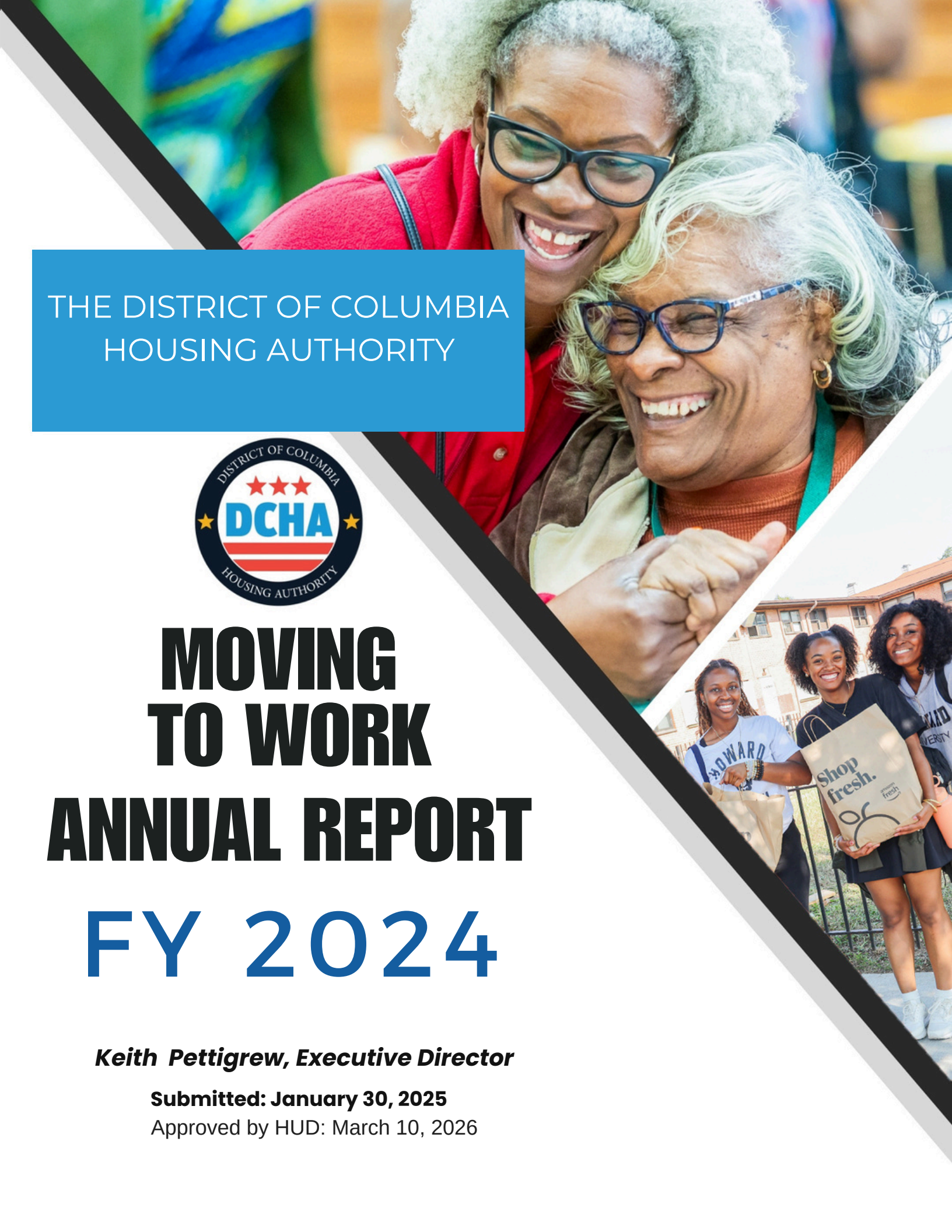




THE DISTRICT OF COLUMBIA
HOUSING AUTHORITY



MOVING TO WORK ANNUAL REPORT FY 2024

Keith Pettigrew, Executive Director

Submitted: January 30, 2025

Approved by HUD: March 10, 2026



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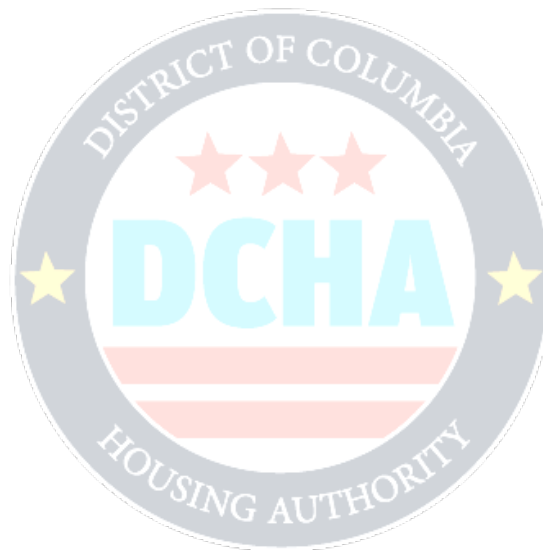
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This Moving to Work (MTW) Annual Report is prepared in accordance with the “Amended and Restated Moving to Work Agreement” between the U.S. Department of Housing and Urban Development and District of Columbia Housing Authority. This agreement was signed by both parties in September 2010. The agreement was extended by Congress and is scheduled to expire at the end of the Housing Authority’s 2038 Fiscal Year. The required elements of the Annual MTW Plan and Annual MTW Report are detailed in HUD Form 50900 (OMB Control Number: 2577-0216 Expiration Date: 08/31/2027).



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Section I. Introduction

A. Overview

The District of Columbia Housing Authority (DCHA) is an independent public agency committed to addressing the housing needs of our community's most vulnerable populations. The Agency is the largest landlord in the District, serving nearly 6,000 households in public housing, approximately 14,000 households in the federal Housing Choice Voucher Program, and more than 7,000 households in locally administered voucher and subsidy programs.

The District of Columbia Housing Authority's (DCHA) Moving to Work (MTW) Annual Report provides information on activities undertaken by DCHA under the MTW Demonstration Program during Fiscal Year 2024, i.e., the period from October 1, 2023 to September 30, 2024.

MTW is a demonstration program authorized by Congress, through which DCHA and 137 other participating agencies nationwide have the flexibility to waive certain statutes, including parts of the 1937 U.S. Housing Act, and HUD regulations in order to design and test approaches for providing housing assistance that address one or more of the following statutory objectives:

- Reduce cost and achieve greater cost effectiveness in federal expenditures.
- Provide incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self-sufficient; and
- Increase housing choices for low-income families.

DCHA has been a participant in the MTW program since July 2003 pursuant to an MTW Agreement with the U.S. Department of Housing and Urban Development (HUD). The MTW Agreement, as amended, describes the authority and flexibility granted to DCHA under the MTW program, along with requirements for participation. DCHA's MTW Agreement with HUD was recently extended through 2038.

The FY 2024 MTW Annual Report includes information on DCHA's housing inventory, waiting list, finances, planned and ongoing MTW activities, and other information required in the HUD Form 50900, which details the reporting requirements applicable to MTW agencies.

B. MTW Goals and Objectives

Long-Term Goals

DCHA's mission is to provide quality affordable housing to extremely low-through moderate-income households, foster sustainable communities, and cultivate opportunities for residents to improve their lives. We are dedicated to addressing the housing needs of the District of Columbia's most vulnerable populations including seniors, people with disabilities and families with children. As an independent public agency, DCHA provides housing assistance to nearly 10% of the District's residents. The agency's work encompasses roles as landlord, property manager, voucher administrator, and real estate developer.

As part of the initial MTW Plan submission, DCHA established five (5) strategic objectives which continue to provide the framework for MTW planning and implementation efforts in FY2024 and beyond:

- Create opportunities to improve the quality of life for DCHA residents through collaboration and partnerships.
- Increase access to quality affordable housing.
- Provide livable housing to support healthy and sustainable communities.
- Foster a collaborative work environment that is outcome drive and meets the highest expectations of the affordable housing industry.
- Effectively communicate agency accomplishments and advocate for its mission.

DCHA is committed to fulfilling its mission and strategic goals by exploring opportunities that address local housing needs and meet MTW statutory objectives. Over the long-term, DCHA will continue to leverage the flexibility provided by its MTW designation to preserve and increase affordable housing, implement program efficiencies and improve the well-being of the residents and families the agency services.

Short-Term Goals

DCHA's Stabilization and Reform Board, which was appointed in December 2022, hired Keith Pettigrew as Executive Director effective November 1, 2023. Since then, he has focused efforts on recruiting a new executive team, addressing outstanding corrective action items from HUD's 2022 review of DCHA operations, and developing a three-year Recovery Plan that provides a framework for preserving and expanding affordable housing and moving the agency to excellence in all areas of operations. Major objectives of the Recovery Plan over the next three-year period that will be supported using MTW flexibility include:

- Preserve or redevelop the existing public housing portfolio through conversion to Section 8 project-based assistance utilizing the Rental Assistance Demonstration (RAD) program, Section 18, RAD/Section 18 blend and other available methods.
- Expand affordable housing opportunities through innovative use of the Restore-Rebuild (formerly "Faircloth-to-RAD") program, Low Income Housing Tax Credits, Housing Choice Vouchers and other programs that leverage DCHA's MTW resources.
- Achieve high rates of occupancy, meet property management and inspection standards, and provide safe and supportive living environments for residents of public housing and other affordable units owned by DCHA.
- Improve voucher utilization and provide Housing Choice Voucher program participants with a diverse range of tenant-based and project-based housing and related service options.
- Connect DCHA residents and program participants to programs and services that provide education and employment opportunities, help families build financial assets and maximize the potential for independent living and self-sufficiency.
- Improve DCHA's organizational infrastructure including data, technology, website, call center and other systems so that they are fully integrated, reliable, functionally robust, and user-friendly.
- Ensure that agency policies and procedures comply with regulatory requirements, are clear and transparent, reflect industry best practices and incorporate innovation and flexibility as allowed through MTW.

Agency Initiatives and Highlights

DCHA is committed to providing all residents served by the agency's housing programs opportunities for achieving economic independence and self-sufficiency. Highlights from FY 2024 include:

- **Homeownership Assistance Program (HOAP):** Using MTW flexibility, DCHA established the HOAP program in 2003 to offer eligible households who are participating in the Housing Choice Voucher Program the opportunity to achieve homeownership. Under the program, DCHA provides housing assistance and financial counseling services for up to five years as families prepare for homeownership. Since the program's inception, 167 households have transitioned from the voucher program to homeownership. In FY 2024, 10 participants in the program became new homeowners, and 129 participants enrolled and worked towards their homeownership goals during the year.
- **Apprenticeship Training Program (ATP):** DCHA's "Pathways to Self-Sufficiency" resident services model includes ATP, a 12-month work-based training program, held on-site at a DCHA public housing community, in which participants learn new career skills and obtain certifications in the building maintenance industry. Enrollees participate in paid classroom and on-the job training and professional development and work alongside DCHA's Property Management Operations team. In FY 2024, 31 participants graduated from the program, with 100% of participants receiving employment offers post-graduation.
- **Credit Building Pilot:** DCHA implemented a city-funded rent reporting and credit building pilot during FY2021. Rent payments are reported to Experian for participating families. Participants also meet regularly with a program coordinator to work on a holistic approach to improving their credit to meet their personal financial goals. Since the program's inception, over 100 participants have applied to the program, 50 residents have participated, and two have become homeowners. Program participants have seen an average increase of 28.5 points in their credit scores and several participants established credit for the first time. This increase in credit has assisted families with goals including homeownership, car purchases, and building small businesses. The program has also led to the establishment of new partnerships, regular financial education workshops, and deepened relationships with residents. As of end of FY 2024, 76 participants are enrolled in the program.

In FY 2024, DCHA continued efforts to address the capital needs of our public housing sites, as well as create and preserve quality affordable housing for extremely low- through moderate-income households. Highlights include:

- **The Asberry/Barry Farm:** In November 2024, DCHA celebrated the grand opening of The Asberry, a 108-unit mixed use development and the first on-site property delivered under the New Communities Initiative at the historically significant Barry Farm community. Using an innovative Restore Rebuild (formerly Faircloth-to-RAD) conversion approach, The Asberry, which has 77 replacement units for former Barry Farm residents, is a 100% affordable, 55+ senior preference residential property that also includes over

5,000 sq. feet of commercial space and amenities for residents. Once completed, the Barry Farm redevelopment will increase the number of affordable housing units available at the site, including the creation of 900 residential units across several buildings, of which at least 380 are affordable replacement units for former residents, as well as an additional 320 other affordable units and 100 homeownership units, plus community serving retail spaces and a large central park with community facilities for on-site services and programs.

- **Park Morton:** In 2024, DCHA continued to move forward with Phase 1 of the preservation and redevelopment of the Park Morton public housing community. Leveraging a combination of tax-exempt bonds, 4% Low-Income Housing Tax Credits, and gap financing from the New Communities Initiative, the 142-unit project will provide long-term affordable housing for the District's residents and is set to open in early FY2025. Of the 142 units, 40 will be dedicated public housing replacement units, ensuring that the community retains its affordability and access for current residents. Phase 1 is the first step in a larger, three-phase plan to redevelop Park Morton, which will ultimately feature 456 modern, mixed-income units. The final development will blend public housing, affordable housing, and market rate units, as well as feature 1-for-1 replacement of existing public housing units.
- **Kenilworth 166:** The first phase of the Kenilworth Courts redevelopment was successfully completed in late 2024, introducing 166 modern, affordable housing units to the vibrant Ward 7 neighborhood of Northeast D.C. This transformative mixed-income community is 100% affordable and was carefully designed to provide a diverse range of housing options. The development includes a 42-unit apartment building with a preference for seniors aged 55 and older, a 65-unit multifamily property, 15 stack-flat apartments, and 44 townhomes. Through strategic financing, including Low-Income Housing Tax Credits and D.C. Housing Production Trust Funds, Kenilworth 166 meets the pressing need for affordable housing, including 88 family-sized units, which will support local families for years to come.

DCHA has also maintained focus on continuous improvement of our internal operations and policies to ensure the long-term stability and success of the agency and better deliver high quality services to the residents we serve. In FY 2024, the agency:

- **Restored in-person customer service:** In response to challenges posed by pandemic-era policies, which led to a loss of direct contact between residents and property managers, as well as between voucher holders and landlords with HCV staff, DCHA has taken steps to make staff more directly available to the public. This straightforward approach has enabled management to address and resolve recurring issues more effectively, leading to a significant reduction in resident complaints and strengthened accountability within our core delivery systems. Our property management offices have resumed their role as active hubs, facilitating quicker resolution of resident concerns and unit issues. DCHA also opened a new office in Chinatown at which HCV applicants, participants, and landlords can meet in person with HCV staff. The HCV program reinstated regular meetings with landlords who participate in the voucher program to foster stronger relationships and ensure continued collaboration and implemented landlord/participant "meet and greets" to facilitate unit leasing. The outcomes have been

overwhelmingly positive: in September 2024, over 2,400 visits were made to our satellite HCV office in Chinatown.

- **Made DCHA more accessible, predictable, and responsive:** By activating our social media platforms, improving our website, publishing a monthly newsletter, and through an improved network of information delivery systems, we have been able to make our programs, policies, and procedures more accessible to public housing residents and HCV participants throughout FY2024. Moreover, DCHA has been able to keep the public informed of our constantly improving policies and of the work of the Board of Commissioners.
- **Better-defined Agency policies and procedures through Board and HUD approvals:** In collaboration with constituents and advocates, DCHA has made significant strides in developing and refining its policies and procedures to enhance community access to its programs. The Board has played a crucial role in overseeing and approving these resolutions, which will guide DCHA in making major changes in the future. Notable resolutions passed by the Board in FY2024 include those that facilitate the repositioning of outdated public housing subsidies and resolutions to establish development principles that prioritize resident partnerships, ensure the replacement of units, uphold the right of residents to return to redeveloped sites, and ensure the maintenance of public control over repositioned sites.



Section II. General Housing Authority Operating Information

A. Housing Stock Information

i. Actual New Project Based Vouchers

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

	Property Name	Number of Project Based Vouchers		Actual Status as the End of the Plan Year**	RAD? (Yes or No)	Description of Project
		Planned	Actual			
1	Ontario Road	13	N/A	Committed	Yes	DCHA received a CHAP under its FY2016 RAD Portfolio Award. DCHA plans to convert the property to RAD for stabilization and moderate rehabilitation. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.
2	Elvans Road	20	N/A	Committed	Yes	DCHA received a CHAP under its FY2016 RAD Portfolio Award. DCHA plans to convert the property to RAD for stabilization and moderate rehabilitation. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.
3	The Villager	20	N/A	Committed	Yes	DCHA received a CHAP under its FY2016 RAD Portfolio Award. DCHA plans to convert the property to RAD for stabilization and moderate rehabilitation. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.
4	Montana Terrace	64	N/A	Committed	Yes	DCHA received a CHAP under its FY2016 RAD Portfolio Award. DCHA plans to convert the property to RAD for stabilization and moderate rehabilitation. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.



	Property Name	Number of Project Based Vouchers		Actual Status as the End of the Plan Year**	RAD? (Yes or No)	Description of Project
		Planned	Actual			
5	Lincoln Road	19	N/A	Committed	Yes	DCHA received a CHAP under its FY2016 RAD Portfolio Award. DCHA plans to convert the property to RAD for stabilization and moderate rehabilitation. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.
6	Judiciary House	263	N/A	Committed	Yes	DCHA received a RAD CHAP for Judiciary House in FY2021, with anticipated closing in FY2025. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.
7	Kenilworth 166 -- Phase 1	101	N/A	Committed	Yes	As part of the Kenilworth redevelopment, DCHA will project based 101 units as part of the first phase of the new construction redevelopment using Restore-Rebuild (formerly Faircloth-to-RAD). DCHA expects 166 units total to come online during phase one (17 to receive subsidy through the Districts Local Rent Supplement Program, LSRP). Phase 1 of Kenilworth 166 was completed in late 2024 and units are now leasing.
8	Potomac Gardens (Family & Senior Mid-Rise)	208	N/A	Committed	Yes	DCHA received a RAD CHAP for Potomac Gardens family and senior midrise in FY2021, with anticipated closing in FY2025. DCHA will be utilizing the Section 18 platform in combination with RAD program for RAD/Section 18 blended conversion. The property will continue to be managed by DCHA or its wholly owned affiliate.
9	Barry Farm -Phase 1 (The Asberry)	44	N/A	Committed	Yes	As part of the Barry Farm redevelopment, DCHA expects 108 total units to come online during phase one, including 77 total replacement units constructed as Restore-Rebuild (formerly Faircloth-to-RAD). The Asberry converted to RAD in late FY24 and units are now leasing.
10	Park Morton	40	N/A	Committed	Yes	As part of the Park Morton redevelopment, DCHA anticipates project basing up to 40 units as part of the first phase of the new construction redevelopment using Restore-Rebuild (formerly Faircloth-to-RAD). DCHA expects 142 units to come online during phase one, including 40 total replacement units. DCHA received an RCCA for this project from HUD in FY2023.



	Property Name	Number of Project Based Vouchers		Actual Status as the End of the Plan Year**	RAD? (Yes or No)	Description of Project
		Planned	Actual			
11	Wheeler Creek	148	N/A	Committed	Yes	A DCHA Hope VI site, Wheeler Creek Apartments ("Wheeler Creek") is a mixed income affordable multifamily property which includes 148 public housing units in 21 separate buildings. DCHA received a RAD CHAP in FY2022.
12	Henson Ridge I	68	N/A	Committed	Yes	A DCHA HOPE VI site, Henson Ridge I is a mixed finance property which included 68 public housing units. In December 2024, DCHA closed on a RAD blend for the site that includes rehab of units .
13	Capper Senior I	163	N/A	Committed	Yes	DCHA received a RAD CHAP for Capper Senior and anticipates converting to RAD in FY2025.
14	2 nd Northwest Cooperative	99	N/A	N/A	No	DCHA Accepted HUD's Invitation to administer 99 enhanced vouchers for households impacted by Section Northwest Cooperative #17's opt-out decision.
15	Foster House	31	N/A	N/A	No	DCHA accepted HUD's invitation to administer 31 tenant protection vouchers for households impacted by Foster House Apartment's opt-out decision.
	TOTAL New PBVs	1,299	N/A			

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

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

Difference between "Planned" and "Actual" number of vouchers that were newly project-based.

DCHA's FY2024 MTW Annual Plan listed 1,441 potential new project-based units. DCHA has committed 1,169 of those units, with subsidy conversions from public housing to PBV to be completed in early FY2025 at Capper Senior 1, Henson Ridge I, and Kenilworth 166 – Phase 1. Additionally, the 140 project-based vouchers from the Friendship Terrace opt-out were added to existing rather than new since HAP was already in place.

ii. Actual Existing Project Based Vouchers

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

	Property Name	Number of Project Based Vouchers		Planned Status as the End of the Plan Year**	RAD? (Yes or No)	Description of Project
		Planned	Actual			
1	Meridian	34	34	Leased	No	Family
2	Edgewood Senior	38	38	Leased	No	Senior
3	2008 3rd Street	11	11	Leased	No	Family
4	Chapin House	15	15	Leased	No	Family
5	Euclid	17	17	Leased	No	Family
6	Weinberg House	6	6	Leased	No	Family
7	First Street	12	12	Leased	No	Family
8	Soho	4	4	Leased	No	Family
9	Beacon House—Good Hope Road	15	15	Leased	No	Family
10	Kenyon	12	12	Leased	No	Family
11	Champlain	28	28	Leased	No	Family
12	Shalom House	89	89	Leased	No	SRO
13	Green Door	4	4	Leased	No	Family
14	Capital Gateway Senior	151	151	Leased	No	Senior
15	Robert Walls Senior	47	47	Leased	No	Senior
16	Henson Ridge II	92	92	Leased	No	Family
17	Oxford Manor	3	3	Leased	No	Family
18	Carver Terrace	103	103	Leased	No	Senior
19	Accessibuild 22 – DCHA	22	22	Leased	No	Family
20	Beacon House	13	13	Leased	No	Family
21	JW King	74	74	Leased	No	Senior
22	St. Paul – Wayne Place Senior	49	49	Leased	No	Senior
23	Birchmere Homes, LLC	2	2	Leased	No	Family
24	Fairlawn	10	10	Leased	No	Family
25	The Overlook	201	201	Leased	No	Senior/Family
26	Affordable Housing Corporation of the District of Columbia	1	1	Leased	No	Family
27	Crawford – Bethune House	20	20	Leased	No	Family
28	Edgewood – Wheeler Terrace	4	4	Leased	No	Senior
29	Williston	28	28	Leased	No	Family
30	Edgewood – Gregory /Vista - - Gregory	50	50	Leased	No	Family
31	Kenilworth	132	132	Leased	No	Family
32	Beacon House	10	10	Leased	No	Family

	Property Name	Number of Project Based Vouchers		Planned Status as the End of the Plan Year**	RAD? (Yes or No)	Description of Project
		Planned	Actual			
33	Community Connections – North Carolina	12	12	Leased	No	Family
34	SOME – Independence Place	21	21	Leased	No	Family
35	Charles Thorton	2	2	Leased	No	Family
36	Bourne Enterprise, LLC	1	1	Leased	No	Family
37	St. Martin	10	10	Leased	No	Family
38	Fendall Height – SOME	29	29	Leased	No	Vash
39	SOME – Griffin House	1	1	Leased	No	Family
40	VIDA Senior	9	9	Leased	No	Senior
41	Ernestine	2	2	Leased	No	Family
42	Kunlipe	1	1	Leased	No	Family
43	Gibson Plaza	20	20	Leased	No	Family
44	WC Smith – 1320 Mississippi Ave	19	19	Leased	No	Family
45	St. Dennis – 1636 Kenyon St	8	8	Leased	No	Family
46	NCC – VASH	60	60	Leased	No	VASH
47	Mi Casa – Intergenerational	20	20	Leased	No	Intergenerational
48	Columbia Road/Colorado Road	44	44	Leased	Yes	RAD Family
49	Matthews Memorial	35	35	Leased	Yes	Family
50	Fairlawn Marshall	30	30	Leased	Yes	Family
51	Conway Center	20	20	Leased	No	SRO
52	St. Stephens	18	18	Leased	No	Family
53	Parkway Overlook	55	105	Leased	No	Family
54	Friendship Terrace	140	125	Leased	No	Senior
	TOTAL Existing PBVs	1,854	1,889			

Difference between “Planned” and “Actual” existing number of vouchers project-based.

As shared in the FY2022 MTW report and FY2024 MTW plan, permanent conversion was completed at Parkway Overlook in FY2022, including 50 additional PBVs. The 125 project-based vouchers from the Friendship Terrace opt-out were added to existing rather than new since HAP was already in place.

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

Narrative description of other changes that occurred during the plan year.

Other Changes to the Housing Stock that Occurred During the Fiscal Year
Offline Units – There were approximately 1,178 Public Housing units offline at the end of FY2024 for rehabilitation and redevelopment projects.
New Communities Initiative – DCHA continues to work cooperatively with the District of Columbia's New Communities Initiative. DCHA closed on the Barry Farm Senior Building 1B "The Asberry" in August 2022 to complete 108 units, of which 77 are replacement units. The building was completed converted to RAD through Restore, Rebuild in October 2024. The second project at Barry Farm "The Edmonson", will deliver 139 units, including 50 replacement units in an elevator multifamily rental apartment building and had financial a closing in May 2024. Construction is ongoing. At Park Morton, Phase 1 financial closing occurred in FY2023. Construction is ongoing with units expected for delivery in winter 2025. Relocation is complete at both Sursum Corda and Sibley Townhomes. DCHA is working to demolish both properties & seek development partners in FY 2025.
Demolition/Disposition Applications – Kenilworth 166 – Phase 1 - DCHA received approval for a phased demolition at Kenilworth 166 – Phase 1 in FY2018. Kenilworth 166 -Phase 1 included 89 units that were demolished in 2021 with HUD approval financial closing occurred in FY2022, allowing new construction to begin for a 166 unit mixed-income site with a new senior building, multi-family building and townhomes. The project began coming online in October 2024 with 101 replacement units converting to RAD through Restore-Rebuild (formerly Faircloth-to-RAD) in December 2024. Park Morton - DCHA received approval for a phased Demolition/Disposition application at Park Morton for a total of 174 units in FY2019. Phase 1 demolition of 60 units will allow for the development of 142 units within a multi-family building. A financial closing for the project occurred in FY2023. DCHA is in the process of seeking local approval to demolish Phase 2 units at Park Morton as planning for Phase construction is ongoing. Sursum Corda and Sibley Townhomes - A Demolition/Disposition application was approved in FY2020. Relocation activities from the site began in FY2020 and are complete. A developer RFP was issued in FY2023 for Sibley Townhomes however no developer selections were made. DCHA received approval to dispose of its headquarters at 1133 N. Capital St. NE in FY2022. The redevelopment of the property is ongoing and Phase 1 began delivery of 430 new units in FY 2024. In FY24 DCHA submitted an additional six Demolition/Disposition applications for: Benning Terrace, Hopkins Apartments, Langston Terrace, Greenleaf Addition/Extension, Greenleaf Mid-Rise, Greenleaf Senior, Greenleaf Gardens, Potomac Gardens, and Horizon. Applications are still waiting for approval from HUD.
RAD CHAPs – A RAD CHAP was submitted and received for Henson Ridge during FY2023. In December 2024 Henson Ridge I had a financial closing as a RAD/Section 18 Blend. Renovation work is expected to be completed in FY 2027. Capper Senior I received a RAD CHAP in January 2024 and converted to RAD in December 2024. DCHA received a RAD CHAP for Judiciary in FY 2021. To date, District funds have been used to fund the renovations of 150 units and work is nearly complete. For Judiciary, DCHA is working with the DC Housing Finance Agency to secure a bond allocation to support funding for the remaining 113 units and common space in FY 2025. DCHA also anticipates a RAD/Section 18 Blend conversion at Judiciary. DCHA received a CHAP for the bundled RAD conversion/rehabilitation of five (5) properties (Montana, Elvans Road, Lincoln Road, Villager, Ontario) in 2018, and is working toward a RAD/Section 18 conversion FY 2025.

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

The following summarizes the actual capital fund expenditures during FY2024 by grant year and development:

CFP2019 (CFP 501-19)

Frontline Cost Center	Relocation Services	\$ 1,823.50
Greenleaf Gardens	A&E Services	\$ 32,406.59
James Apartments	A&E Services	\$ 26,957.96
Kelly Miller	N/A	\$ 18,850.00
Kelly Miller Dwellings	A&E Design Services	\$ 33,130.00
Langston Terrace	Unit Renovations	\$ 313,391.40
Ledroit Apartments	A&E Services	\$ 265,671.18
Sibley Plaza	Roof Survey	\$ 122,523.82
Sursum Corda	Relocation Services	\$ 581.94

CFP2020 (CFP 501-20)

Carroll Apartments	Generator Replacement	\$ 71,630.28
Carroll Apartments	Construction Administration Fees	\$ 1,790.76
Carroll Apartments	Construction Administration Fees	\$ 8,953.78
Greenleaf Gardens	Generator Replacement	\$ 86,278.33
Greenleaf Gardens	Construction Administration Fees	\$ 8,627.83
Greenleaf Gardens	Construction Administration Fees	\$ 6,902.27
Greenleaf Gardens	Lead Remediation	\$ 112,870.32
Hopkins Apartments	Generator Replacement	\$ 75,137.44
Hopkins Apartments	Construction Administration Fees	\$ 2,911.57
Hopkins Apartments	Construction Administration Fees	\$ 8,359.05
Langston Terrace	Lead Abatement	\$ 56,991.71
Langston Terrace	Construction Administration Fees	\$ 19,186.20
Langston Terrace	Construction Administration Fees	\$ 10,792.92
Langston Terrace	Construction Administration Fees	\$ 21,313.41
Lincoln Road	Replace Fire Escape	\$ 145,766.89

CFP2021 (CFP 501-21)

1133 N. Capitol St	Security Lighting & Fencing Repairs	\$ 891,049.24
Benning Terrace	Unit Stabilizations & Stairwell Renovations	\$ 515,049.81
Benning Terrace	Unit Stabilizations & Stairwell Renovations	\$ 261,750.68
Benning Terrace	Unit Stabilizations & Stairwell Renovations	\$ 2,677,904.13
COCC	Environmental Consulting Services	\$ 77,942.54
COCC	Environmental Review - various sites	\$ 22,629.09
Claridge Towers	Construction Administration Fees	\$ 10,610.92
Claridge Towers	Construction Administration Fees	\$ 13,129.26
Claridge Towers	Construction Administration Fees	\$ 10,870.35
Claridge Towers	Construction Administration Fees	\$ 18,654.76
Claridge Towers	Construction Administration Fees	\$ 9,700.48
Claridge Towers	Construction Administration Fees	\$ 8,954.28
Claridge Towers	Make Ready Units	\$ 74,619.04
Greenleaf Gardens	Extended Rental for Temporary Boiler	\$ 125,255.71



Greenleaf Gardens	JOC Order Fees	\$ 2,442.49
Highland Additions	Make Ready Units	\$ 228,396.51
Highland Additions	Site Test Borings & Report	\$ 24,250.00
Highland Additions	Construction Administration Fees	\$ 14,400.18
Highland Additions	Construction Administration Fees	\$ 18,728.30
Highland Additions	Construction Administration Fees	\$ 11,422.06
Highland Additions	Construction Administration Fees	\$ 10,768.02
Highland Additions	Construction Administration Fees	\$ 17,495.67
Highland Additions	Make Ready Units at Highland Add.	\$ 144,001.77
Hopkins Apartments	JOC Order Fees	\$ 5,788.30
Horizon House	A&E Services	\$ 43,600.00
Horizon House	Contract Administration Fees	\$ 17,275.28
Horizon House	Make Ready Units	\$ 38,278.42
James Creek	Construction Administration Fees	\$ 11,143.07
James Creek	Construction Administration Fees	\$ 5,097.84
James Creek	Construction Administration Fees	\$ 2,030.12
James Creek	Construction Administration Fees	\$ 8,496.40
James Creek	Make Ready Units at James Creek	\$ 144,514.05
Judiciary House	Construction Administration Fees	\$ 42,809.97
Judiciary House	Make Ready FCU & Ph I Fan Coil Unit	\$ 75,546.42
Kelly Miller	JOC Order Fees	\$ 487.50
Lincoln Road	Inspections for Fire Escape	\$ 3,782.50
Lincoln Road	Inspections for Fire Escape	\$ 21,419.50
Woodland Terrace	Construction Administration Fees	\$ 10,338.06
Woodland Terrace	Lead Abatement	\$ 94,666.50
<u>CFP2022 (CFP 501-21)</u>		
Benning Terrace	JOC Order Fees	\$ 366.75
Benning Terrace	Landscaping	\$ 17,890.42
Benning Terrace	Construction Administration Fees	\$ 2,259.50
Benning Terrace	Construction Administration Fees	\$ 5,494.30
Benning Terrace	Construction Administration Fees	\$ 1,235.33
Benning Terrace	Construction Administration Fees	\$ 2,738.35
Benning Terrace	Construction Administration Fees	\$ 5,118.80
Benning Terrace	Construction Administration Fees	\$ 14,710.00
Benning Terrace	Construction Administration Fees	\$ 2,246.50
Benning Terrace	Construction Administration Fees	\$ 6,711.42
Benning Terrace	Landscaping	\$ 232,228.72
CAPITAL GATEWAY	Feasibility Study	\$ 151,174.77
CAPPER SR.	Environmental Review	\$ 5,741.61
CAPPER SR.	Radon Testing	\$ 5,065.00
COCC	Environmental Review - various sites	\$ 10,006.91
COCC	DCHA Police Vehicles	\$ 234,625.00
Claridge Towers	A&E Services	\$ 15,336.15
Claridge Towers	Fire Alarm System Assessment	\$ 89,802.14
Garfield Terrace	Emergency Fire Alarm Repairs	\$ 43,169.52
Garfield Terrace	JOC Order Fees	\$ 884.98
Garfield Terrace	DHW Heater, Pumps, Piping & Boiler	\$1,023,250.00
Greenleaf Gardens	A&E Design Services	\$ 84,610.10
Greenleaf Gardens	A&E Services	\$ 68,117.98

Greenleaf Gardens	JOC Order Fees	\$ 13,940.00
Greenleaf Gardens	A&E Design Services	\$ 62,504.90
Greenleaf Gardens	Emergency Inspection & Repairs	\$ 629,827.48
Greenleaf Garden	Construction Administration Fees	\$ 20,734.89
Greenleaf Gardens	Construction Administration Fees	\$ 57,411.90
Greenleaf Gardens	Construction Administration Fees	\$ 10,419.58
Greenleaf Gardens	Phase 1 Landscaping Project	\$ 260,489.31
Hopkins Apartments	HVAC System Evaluation Services a	\$ 49,600.00
Hopkins Apartments	Emergency Inspection & Repairs	\$ 494,308.17
James Apartments	Make Ready Units	\$ 64,815.00
James Apartments	Design Services & Façade/Chimney Repairs	\$ 284,126.44
James Creek	A&E Services	\$ 32,352.41
James Creek	HVAC System Evaluation Services	\$ 30,010.00
James Creek	A&E Services	\$ 100,417.01
Judiciary House	A&E Services	\$ 65,200.00
Judiciary House	Building Permits	\$ 22,000.00
<u>CFP2023 (CFP 501-21)</u>		
Benning Terrace	Landscaping Phase 2	\$ 175,164.90
COCC	HCVP Office Space & Call Center Rehab.	\$ 719,153.76
COCC	JOC Order Fees	\$ 15,600.00
Greenleaf Gardens	Environmental Services	\$ 32,720.01
Harvard Towers	Make Ready Renovations & Unit Turns	\$ 200,940.00
Harvard Towers	JOC Order Fees	\$ 41,041.12
Kelly Miller	Temporary Repair Flooring	\$ 255,479.41
Langston Addition	A&E Services	\$ 199,752.76
LeDroit Apartments	A&E Services	\$ 107,579.52
Potomac Gardens	Building Entry Door Replacement	\$ 824,507.65
Potomac Gardens	JOC Order Fees	\$ 17,864.33
Sibley Plaza	JOC Order Fee	\$ 6,688.42
Sibley Plaza	JOC Order Fees	\$ 38,048.13
Sibley Plaza	Unit Rehab (Added Units)	\$ 195,120.00
Stoddert Terrace	Landscaping	\$ 33,631.20
Syphax Gardens	Building Entry Door Replacement	\$ 718,253.01
Syphax Gardens	JOC Order Fees	\$ 15,365.08
Woodland Terrace	JOC Order Fees	\$ 42,844.52
Woodland Terrace	Roof Top Exhaust & 20 Walkup Apts.	\$1,994,350.93
Benning Terrace	Landscaping Phase 2	\$ 175,164.90
COCC	HCVP Office Space & Call Center Rehab	\$ 719,153.76
COCC	JOC Order Fees	\$ 15,600.00
Greenleaf Gardens	Environmental Services	\$ 32,720.01
Harvard Towers	Make Ready Renovations & Unit Turns	\$ 200,940.00
Harvard Towers	JOC Order Fees	\$ 41,041.12
Kelly Miller	Temporary Repair Flooring	\$ 255,479.41
Langston Addition	A&E Services	\$ 199,752.76
LeDroit Apartments	A&E Services	\$ 107,579.52
Potomac Gardens	Building Entry Door Replacement	\$ 824,507.65
Potomac Gardens	JOC Order Fees	\$ 17,864.33
Sibley Plaza	JOC Order Fee	\$ 6,688.42



Sibley Plaza	JOC Order Fees	\$ 38,048.13
Sibley Plaza	Unit Rehab (Added Units)	\$ 195,120.00
Stoddert Terrace	Landscaping	\$ 33,631.20
Syphax Gardens	Building Entry Door Replacement	\$ 718,253.01
Syphax Gardens	JOC Order Fees	\$ 15,365.08
Woodland Terrace	JOC Order Fees	\$ 42,844.52
Woodland Terrace	Roof Top Exhaust & 20 Walkup Apts.	\$1,994,350.93

B. Leasing Information

i. Actual Number of Households Served at the End of the Fiscal Year

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

Number of Households Served	Number of Unit Months Occupied/Leased*		Number of Households Served	
	Planned	Actual	Planned	Actual
MTW Public Housing Units Leased	71,928	59,808	5,994	4,984
Housing Choice Vouchers (HCV) Utilized	128,904	129,156	10,742	10,763
Local, Non-Traditional: Tenant-Based	N/A	N/A	N/A	N/A
Local, Non-Traditional: Property-Based	N/A	N/A	N/A	N/A
Local, Non-Traditional: Homeownership	N/A	N/A	N/A	N/A
Planned and Actual Totals	200,832	188,964	16,736	15,747

Difference between “Planned” and “Actual” households served.

DCHA increased overall leasing under the voucher program from 84% to 88% in FY24. DCHA continues to focus on increasing public housing occupancy rates.

Local, Non-Traditional Category	Number of Unit Months Occupied/Leased*		Number of Households Served	
	Planned	Actual	Planned	Actual
Tenant-Based	-	-	-	-
Property-Based	-	-	-	-
Homeownership	-	-	-	-
Planned/Actual Totals	-	-	-	-

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

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

Housing Program	Description of Leasing Issues and Solutions
Public Housing	<u>Refusals</u>: DCHA continues to experience significant challenges with refusals, largely due to applicants preferring larger bedroom (BR) sizes when offered 0 BR units, safety concerns, and a general preference for vouchers. <u>Unit Turnovers, Unit Conditions and Transfers</u>: In the first quarter of FY2024, DCHA hosted several open-house events, such as Turn-the-Key Tuesday and Thursday, to increase occupancy across its portfolio. These events aim to attract new residents and fill available units. As part of its Portfolio Stabilization initiative, DCHA continues to fill newly remodeled units that were previously offline for modernization. These units are being filled with residents from the transfer list as well as new admissions. The agency's ongoing efforts focus on providing safe and sanitary housing while revitalizing and stabilizing the housing stock.
Housing Choice Voucher	In FY2024, DCHA pulled 20,539 households from the HCV waiting list, with 1,726 applicants receiving eligibility determinations. DCHA maintained the payment standard at 187% of the FMR to help participants secure housing in DC's high-rent markets and opportunity neighborhoods. To further boost leasing activity, DCHA made a concerted effort to connect tenants with landlords through "Meet and Lease" events, held four times per month. As a result, the agency's leasing success rate increased from 84% to 88% in FY2024. In FY2024, to alleviate landlords' concerns about the rent reasonableness policy, DCHA held Landlord Townhalls to train on the rent reasonableness process and provided updates on program policies and procedures. Additionally, DCHA held Resident Townhall meetings to educate participants on rent reasonableness, affordability, and utility allowance charts. DCHA continues to leverage its MTW authority, offering security deposits up to one month of HAP for new lease-ups.
Local, non-Traditional	N/A

C. Waiting List Information

i. Wait List Information at Fiscal Year End

Snapshot information on the actual status of MTW waiting lists at the end of the Plan Year. The “Description” column should detail the structure of the waiting list (indicating whether the waiting list is site-based or agency-wide for public housing) and the population(s) served.

Housing Program(s) *	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
Public Housing	Site-Based	2,620	DCHA plans to open site-based waiting lists in FY25.	No
Housing Choice Voucher	Community-wide	18,083	Closed	No
Housing Choice Voucher (Mod-Rehab)	Community-wide	21,220	Closed	No

Please describe any duplication of applicants across waiting lists.

Applicants can select to be listed on multiple waiting lists, both DCHA managed and those managed by other entities. As such, there are applicant households who appear on more than one of the above lists.

ii. Actual Changes to the Waiting List(s) in the Plan Year

Describe any actual changes to the organizational structure of policies of the waiting list(s), including any opening or closing of a waiting list during the plan year.

Waiting List Name	Description of Actual Changes to the Waiting List
Public Housing	During FY2024, DCHA continued to determine eligibility for the remaining families on the waitlist. DCHA sent 3,144 families from the public housing waitlist letters for the Asberry (Barry Farms) Kenilworth (K1660), and Park Morton. DCHA plans to re-open the public housing waiting list using a site-based methodology in early 2025.
Housing Choice Voucher	During FY2024, DCHA pulled 20,539 applicants from the HCV waiting list. 1,726 applicants completed eligibility determinations during the fiscal year.
Housing Choice Voucher (Mod-Rehab)	During FY2024, DCHA pulled 20,539 applicants from the HCV waiting list. 1,726 applicants completed eligibility determinations during the fiscal year.

D. Information on Statutory Objectives and Requirements

i. 75% of Families Assisted are Very Low-Income

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

Income Level	Number of Local, Non-Traditional Households Admitted in the Plan Year
80%-50% Area Median Income	N/A
49%-30% Area Median Income	N/A
Below 30% Area Median Income	N/A
Total Local, Non-Traditional Household Admitted	N/A

ii. Maintain Comparable Mix

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

Baseline for the Mix of Family Sizes Served (upon entry to MTW program)**					
Family Size*	Occupied Number of Public Housing Units	Utilized HCVs	Non-MTW Adjustments*	Baseline Mix Number	Baseline Percentages
0 bdrm	2,255	see previous column	2,255	2,255	13.7%
1 bdrm	3,592	see previous column	3,592	3,592	21.8%
2 bdrm	5,193	see previous column	5,193	5,193	31.6%
3 bdrm	3,857	see previous column	3,857	3,857	23.4%
4 bdrm	1,177	see previous column	1,177	1,177	7.2%
5 bdrm	343	see previous column	343	343	2.1%
6+ bdrm	35	see previous column	35	35	0.2%
TOTAL	16,452		16,452	16,452	100%

*“Non-MTW Adjustments” are defined as factors that are outside the control of the MTW PHA and/or unrelated to the MTW PHA’s local MTW program. An example of an acceptable “Non-MTW Adjustment” would include demographic changes in the community’s overall population. If the MTW PHA includes “Non-MTW Adjustments,” a thorough justification, including information substantiating the numbers given, should be included below. MTW PHAs must continue to adhere to all fair housing obligations as detailed in the MTW Certifications of Compliance. MTW PHAs must continue to adhere to all Federal, State, and local fair housing and civil rights obligations including those detailed in the MTW Certifications of Compliance.

**DCHA uses bedroom size as the proxy for family size for purposes of calculating baseline and actual unit counts.

Describe the justification for any “Non-MTW Adjustments” given above.

None

Baseline for the Mix of Family Sizes Served (in current Plan Year)				
Family Size	Baseline Mix Percentage**	Number Of Households Served In Plan Year^	Percentage Of Households Served	% Change From Baseline Year To Current Plan Year
0 bdrm	13.7%	1,080	6.86%	-6.84%
1 bdrm	21.8%	5,485	34.83%	13.03%
2 bdrm	31.6%	4,545	28.86%	-2.74%
3 bdrm	23.4%	3,015	19.15%	-4.25%
4 bdrm	7.2%	1,064	6.76%	-0.44%
5 bdrm	2.1%	436	2.77%	0.67%
6+ bdrm	0.2%	122	.77%	0.57%
TOTAL	100%	15,747	100%	-

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

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

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

Description of the justification for any variances of more than 5% between the Plan Year and the Baseline year

As provided in DCHA’s 2003 MTW agreement and subsequent annual reports, the agency has provided family size in terms of bedroom size in a cumulative number for both the Public Housing and HCV programs. The percent change from the 2003 baseline bedroom size distribution can be attributed to shifts in the demographics of voucher holders. DCHA pulls households from the waiting list for federal vouchers by date and time of application and preference, not bedroom size. Therefore, the mix of household sizes needed by the households DCHA serves can change frequently. The percentage of households served by family size (bedroom size) is generally consistent with bedroom sizes reported in the American Community Survey for the Washington Metropolitan Area. According to the U.S. Census Bureau, 2023 American Community Survey 1-Year Estimates¹, the housing stock of renter-occupied housing units in Washington, DC includes the following breakdown by unit size: 11.9% 0-bedroom units, 31% 1 bedroom units, 44.2% 2 or 3 bedroom units, and 12.9% are 4 or more bedroom units.

¹

[https://data.census.gov/table/ACSST1Y2023.S2504?q=United%20States&t=Owner/Renter%20\(Tenure\)&g=040XX00US11&y=2023](https://data.census.gov/table/ACSST1Y2023.S2504?q=United%20States&t=Owner/Renter%20(Tenure)&g=040XX00US11&y=2023)

iii. Number of Households Transition to Self-Sufficiency by Fiscal Year End

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

Activity Name/#	Number of Households Transitioned*	Agency Definition of Self Sufficiency
Modification to HCV Homeownership Program/Initiative #3 (HOAP)	10	Households purchasing homes
Simplified Certification and Multi-Year Income Recertification/Initiative #4	219	HCV families who are able to afford the full contract rent and Public Housing families who transition from TANF due to increased earnings
Encourage the Integration of Public Housing Units into Overall HOPE VI Communities/Initiative #23	0	Families participating in community governance activities and events
Modifications to the HCV Family Self-Sufficiency Program/Initiative #32	0	# of households to become homeowners/rent in the private rental market as a result of completion of the FSS program under the new policy
<i>Households Duplicated Across Activities/Definitions</i>	<i>0</i>	
Total Households Transitioned to Self Sufficiency	229	

Section III. Proposed MTW Activities

Table 1. Summary of Proposed Activities

New Number	Old Number	Activity	Statutory Objective	MTW Flexibility	Yr. Identified

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

Section IV. Approved MTW Activities: HUD Approval Previously Granted

A. Implemented Activities

Table 2. Summary of MTW Activities/Initiatives

New Number	Old Number	Activity	Statutory Objective	MTW Flexibility	Fiscal Year	
					Approved	Implemented
1	1.1.04 1.5.05 1.9.06	Modifications to DCHA's Project-Based Voucher Program	• Increase housing choices for low-income families	Sections D4 and D7 of Attachment C.	FY2004, FY2005 & FY2006	FY2004, FY2005 & FY2006
3	1.4.04	Modifications to HCV Homeownership Program	• Reduce cost and achieve greater cost effectiveness • Increase housing choices for low-income families	Sections C11, D2, D8, D(1)(b), D(8)(a), and E of Attachment C.	FY2004	FY2004
4	2.1.04	Simplified Certification and Multi-Year Income Recertification	• Reduce cost and achieve greater cost effectiveness • Encourage families to obtain employment and become economically self sufficient	Sections C4 and D1c of Attachment C.	FY2004	FY2004
7	4.1.04	DCHA Subsidiary to Act as Energy Services Company	• Reduce cost and achieve greater cost effectiveness	Attachment D.	FY2004	FY2004
8	1.6.05 3.8.10	Modifications to Methods for Setting Total Tenant Payments and Determining HCV Market Rents and Promoting Deconcentration	• Reduce cost and achieve greater cost effectiveness • Increase housing choices for low-income families	Section D2 of Attachment C.	FY2005 & FY2010	FY2005 & FY2010
11	1.10.06; 2.5.04; 3.9.12; 22	Site-based In-take and Waiting List Management of Public Housing, Redeveloped Properties and Service Rich Properties	• Reduce cost and achieve greater cost effectiveness • Encourage families to obtain employment and become economically self-sufficient • Increase housing choices for low-income families	Sections C1, C9b, C10, C11, and D4 of Attachment C.	FY2004 FY2012	FY2005 FY2014
12	3.5.06	Rent Simplification and Collections	• Reduce cost and achieve greater cost effectiveness	Sections C11 and D2 of Attachment C.	FY2006	FY2006

New Number	Old Number	Activity	Statutory Objective	MTW Flexibility	Fiscal Year	
					Approved	Implemented
17	2.8.11	Change in Abatement Process, including Assessment of a Re-inspection Fee as an Incentive to Maintain Acceptable Housing Quality Standards (HQS) in Voucher Assisted Units	Reduce cost and achieve greater cost effectiveness	Section D5 of Attachment C.	FY2011	FY2012
18	3.9.11	Creation of Local Authorization and Release of Information Form with an Extended Expiration to Support the Biennial Recertification Process	Reduce cost and achieve greater cost effectiveness	Sections C4 and D3b of Attachment C.	FY2011	FY2012
20	2.9.12	Enhance Neighborhood Services within Public Housing Communities	Encourage families to obtain employment and become economically self-sufficient	Sections B1b3, C1 and C15 of Attachment C.	FY2012	FY2012
23	3.10.12	Encourage the Integration of Public Housing Units into Overall HOPE VI Communities	Increase housing choices for low-income families	Section C2 and C11 of Attachment C.	FY2012	FT2015
25	NA	Local Blended Subsidy	- Reduce cost and achieve greater cost effectiveness - Increase housing choices for low-income families	Attachment C, Section B.1; Attachment D, Uses of Funds	FY2014	FY2014
32	N/A	Modifications to the HCV Family Self-Sufficiency Program	Increase housing choices for low-income families	Attachment C, Section D(1)(a)	FY2019	FY2020
33	N/A	Waiver for Third-Party Housing Quality Standards (HQS) Inspections	Reduce cost and achieve greater cost effectiveness	Attachment C, Section D.1.f, D.5, D.7.a and D.7.d ²	FY2021	FY2021

² Authorizations now derived from Fifth Amendment to Attachment C of the MTW Agreement.

Initiative 1: Modifications to DCHA's Project Based Voucher Program

Description/Impact/Update

In order to increase housing choices for low-income families, as part of its Partnership Program, DCHA modified existing project-based voucher (PBV) rules and regulations. Specifically, the changes included:

- Allow a longer HAP contract term—from 10 to 15 years.
- Increase the threshold of units that can be project-based at a single building from 25% to 100%.
- Increase the percentage of DCHA's total voucher allocation that can be project-based to greater than 20%.
- Allow the owners of PBV units to establish site-based waiting lists.
- Allow applicants on the Public Housing waiting list who are determined to be eligible for UFAS units to be eligible for UFAS PBV units that are subsidized through the Partnership Program.
- Allow applicants on the Public Housing waiting list who are determined to be eligible for accessible units meeting Uniform Federal Accessibility Standards (UFAS) to be eligible for UFAS PBV units that are subsidized through the Partnership Program.
- Create a UFAS Loan Program to assist landlords in converting existing units to UFAS units or create new UFAS units that are subsidized through the Partnership Program and thus creating more housing choices for the disabled and their families.

The changes resulted in:

- Increasing participation by housing owners/landlords
- Meeting local housing and community needs

In addition, between FY2004 and FY2006, DCHA used its flexibility to award project-based vouchers to properties with affordable units who were receiving local funding through the city's Tenant Assistance Program (TAP). The city discontinued funding for the properties in the program and without MTW flexibility, 328 families would have been displaced as a result.

During FY2019, 55 units were project based at Parkway Overlook through the agency's continued partnership with the city to create affordable housing with supportive services through the city's local NOFA process. During FY2022, an additional 50 units became project based at Parkway Overlook during permanent conversion.

DCHA stopped making loans through the UFAS Loan program several years ago. As such, no additional UFAS units are being added to the DCHA portfolio via this initiative. However, the units that have been created continue to be available for housing families in need of fully accessible units.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing.

Initiative 3: Modifications to HCV Homeownership Program

Description/Impact/Update

As part of DCHA's efforts to develop new housing opportunities for low-income families that promote self-sufficiency, the Agency explored and implemented various modifications to its HCV Homeownership Program (HOAP), as regulated by HUD, that make it:

- more attractive to financial institutions and DCHA participants/residents;
- more user-friendly to DCHA participants interested in homeownership;
- more cost efficient to administer; and
- more realistic in promoting long-term homeownership success.

The result was the establishment of the following policies utilizing MTW flexibility:

1. The minimum down payment was set at 3% with no minimum required from the family's personal resources
2. A recapture mechanism was established what allows for the recapture of a portion of the homeownership (mortgage payments) assistance if the family leaves the property in the first 10 years
3. The employment requirement was increased from one year to at least two years
4. Portability is no longer permitted under the Homeownership program.
5. A termination clause was included providing for the termination of a Household from the program if the household income falls below the minimum amount required for more than 12 months.

In FY2024, 10 participants in the program became new homeowners, while 129 participants were enrolled. Since the program's implementation in 2003, 167 participants have achieved homeownership.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity

have been removed in FY2024. DCHA will continue to report on agency defined metrics for this activity.

Actual Significant Changes

Per the FY2024 MTW Plan, DCHA closed the Achieving Your Best Life Rewards (AYBL) portion of this initiative. DCHA closed this place-based, public housing homeownership program as both AYBL public housing communities either converted to RAD or will convert. Additionally, public housing residents now have opportunities to work toward homeownership under Initiative 32. All former AYBL participants completed their contract terms, received required notices, and passed their grievance periods as of the end of FY2022.

Status

Implemented and Ongoing.

Metrics

DCHA Defined Metric(s)

Unit of Measurement	Baseline (FY2010)	Benchmark	Outcome (FY2024)	Benchmark Achieved?
Housing Choice Voucher participants				
Number of HCV families purchasing homes	51	At least 5 additional families each FY	10 (new homeowners at the end of FY2024)	Benchmark met

Initiative 4: Simplified Certification and Multi-Year Income Recertification

Description/Impact/Update

This initiative has two parts—Simplified Certification and Multi-Year Recertification, both designed to make the income and eligibility determination process more efficient and cost effective. The initiative has a double benefit. First, it saves staffing costs so that scarce resources can be used where they bring more benefit to DCHA's customers. Second, it provides greater convenience, as well as incentives for self-sufficiency to residents of DCHA properties and applicants for housing or assistance provided through DCHA.

Simplified Certification

At final determination of eligibility, as applicants are pulled from the waiting lists and forwarded to HCV or Public Housing for lease-up, DCHA extended the length of time the verified application data is deemed valid to 180 days. This has reduced the amount of duplicative work required of eligibility staff in DCHA's Client Placement Division as well as reduced the time necessary to build a qualified applicant pool.

Multi-year Recertification (Biennial Recertification)

In FY2007, DCHA began conducting re-certifications for HCV participants every two years, instead of annually. In conjunction with this change, DCHA adopted local rules for the HCV program that provide work incentives for all participants. Specifically, any increase in earned income in the amount of \$10,000 or less would not result in an increase in rent until the family's next scheduled biennial recertification. However, a family could request an interim recertification

and reduction of rent due to a reduction in income. These revised procedures were developed with the assumption that the policy would provide an ongoing incentive to residents and voucher holders to increase income by removing the current limitation on eligibility for the earned income disregard.

In FY2013, DCHA drafted Public Housing biennial recertification regulations with the final regulations approved by the DCHA Board of Commissioners in early FY2014.

In FY2015, DCHA re-proposed this initiative, removing the requirement to report increases in earned income greater than \$10,000 between scheduled recertifications. In FY2016, DCHA finalized the HCV Administrative Plan, eliminating the need for HCV participants to report increases in earned income between scheduled recertifications. The HCV program began implementation in FY2016.

As part of the FY2016 MTW Plan, DCHA proposed and received HUD approval to implement triennial recertifications in the HCV and Public Housing programs for Elderly and/or Disabled households on fixed income. In FY2017, both the public housing and HCV programs completed assignment of elderly and/or disabled households on fixed income into a triennial recertifications schedule.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing.

Initiative 7: DCHA Subsidiary to Act as Energy Services Company

Description/Impact/Update

In 2007, following HUD's approval of DCHA's Energy Capital Improvement Plan, DCHA closed an Equipment Lease/Purchase agreement in the amount of \$26,024,925. DCHA used Construction Services Administration, LLC (CSA), a wholly owned subsidiary, as its Energy Services Company (ESCO). DCHA used HUD provisions allowing, for the purposes of energy subsidy calculation, a frozen base of consumption costs plus actual consumption costs savings to amortize private financing of a comprehensive DCHA energy management program. The frozen base method of operating subsidy calculation was used for some aspects of the program in conjunction with an add-on for energy conservation related debt service for other aspects of DCHA's comprehensive energy conservation program.

Using its MTW Authority, DCHA may, without prior HUD approval, modify the current energy performance contract (EPC) or enter into new performance contracts with Energy Service Companies (ESCOs), also called Energy Service Agreements (ESAs), and determine the terms

and conditions of EPCs, provided that, with respect to each contract, (i) the term does not exceed 20 years and (ii) the Agency maintains adequate file demonstrating EPC performance. DCHA or its agents or subsidiaries may also function as its own ESCo, provided that any financing complies with requirements (i) through (ii) of this paragraph. HUD will honor the terms and conditions of such contracts during and beyond the term of DCHA's MTW Agreement. DCHA has also received approval to pledge its reserves or other funds for use during the term of the MTW demonstration to guarantee the payment of debt service in the event the energy savings are not adequate to cover debt service costs.

DCHA secured \$26 million in funding to implement DCHA's energy efficiencies as articulated in the Agency's plan. As of the end of FY2013, the entire \$26 million of the loan proceeds have been expended. In FY2012, DCHA took advantage of the very favorable interest rate environment and refinanced its energy loan. The flexibility to execute the new loan documents without HUD approval greatly simplified and sped up the process, saving an unknown amount of DCHA and HUD staff-time. The refinancing shortened the term on the loan while keeping payments relatively unchanged, greatly reducing interest expenses over the life of the loan.

HUD released PIH Notices 2011-36 and 2014-18 providing guidance to allow PHAs the ability to retain 100% of cost savings if they (1) reduce energy consumption and (2) produce energy. In addition, HUD has provided further guidance to allow PHAs to capture future savings from ECIP Phase I as an incentive to upgrade the ECIP Phase I equipment at the end of its useful life.

DCHA continues its energy investment through ECIP Phase II. Starting in October 2015, ECIP I has been extended an additional eight (8) years to 2029. Since that time, DCHA received a \$575,000 Sustainable DC Grant to fund predevelopment activities for ECIP Phase II.

The DCHA Subsidiary acting as Energy Services Company previously adopted policies and procedures to monitor, manage and verify that a sustainable infrastructure prescriptive maintenance program be adopted for all mechanical systems to protect the savings stream as projected. This was a non-significant change since this was anticipated in the initial application.

Actual Non-Significant Changes

There were no actual non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

There were no changes to the initiative metrics in FY2024; however, following the required metrics, DCHA is adding the detailed energy consumption data for FY2024 to consolidate reporting to HUD.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing.

Metrics

As required in Attachment D of DCHA's MTW Agreement with HUD, the required metrics are provided below. FY2011-FY2017 are on this page, and FY2018-FY2024 are on the following page.

EPC Reporting Requirements	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Is the project ESCo or Self-developed?	self-developed	self-developed	self-developed	self-developed	self-developed	self-developed	self-developed
Number of rehabilitated units in the energy project?	5,444	5,444	5,444	5,444	5,444	5,444	5,444
Number of rehabilitated AMPs in the energy project?	31	31	31	31	31	31	31
What is Total Investment?	\$26,024,925	\$26,024,925	26,024,925	\$26,024,925	\$26,024,925	\$26,024,925	\$26,024,925
What is Total Financed?	\$26,024,925	\$26,024,925	26,024,925	\$26,024,925	\$26,024,925	\$26,024,925	\$26,024,925
What is Debt Service (Annual)?	\$2,878,597	\$2,989,371	3,185,506	\$3,185,506	\$3,185,506	\$3,185,506	\$3,185,506
What are Guaranteed Savings?	\$3,143,583	\$3,143,583	3,143,583	\$3,143,583	\$3,143,583	\$3,143,583	\$3,143,583
What are Actual Savings?	\$2,651,000	\$3,180,247	\$2,893,505	\$4,347,925	\$7,549,150	\$8,478,264	\$8,994,925
What is the Investment per unit?	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48
What is the Finance per unit?	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48	\$4,780.48
What is the Actual Savings per unit?	\$528.77	\$584.17	\$531.50	\$798.66	\$1,386.69	\$1,557	\$1,652
What is the Savings per project (AMP)?	\$92,859.58	\$102,588.61	\$93,338.87	\$140,255	\$243,520.96	\$273,492	\$290,159
What is the Term of the contract?	12 years	12 years	12 years	12 years	12 years	12 years	12 years
What date was the Request for Proposal issued?	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP
What was Date Audit Executed?	April through June of 2004	April through June of 2004	April through June of 2004	April through June of 2004	April through June of 2004	April through June of 2004	April through June of 2004
What was Date Energy Services agreement executed?	September 28, 2007	September 28, 2007	September 28, 2007	September 28, 2007	September 28, 2007	September 28, 2007	September 28, 2007
What was Date Repayment starts?	December 20, 2007	December 20, 2007	December 20, 2007	December 20, 2007	December 20, 2007	December 20, 2007	December 20, 2007
What Types of Energy Conservation Measures were installed at each AMP site?	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation.

EPC Reporting Requirements	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024
Is the project ESCo or Self-developed?	self-developed	self- developed	self- developed	self-developed	self-developed	self-developed	self-developed
Number of rehabilitated units in the energy project?	5,444	5,444	5,444	5,444	5,444	5,270	5,270
Number of rehabilitated AMPs in the energy project?	31	31	31	31	31	30	30
What is Total Investment?	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997
What is Total Financed?	\$111,829,992	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997	\$111,829,997
What is Debt Service (Annual)?	\$7,018,671	\$9,341,765	\$9,341,765	\$9,341,765	\$9,341,765	9,333,087.60	\$9,333,087.60
What are Guaranteed Savings?	\$9,465,076	\$10,101,698	\$11,788,909	\$10,231,452	\$11,826,618	\$11,141,105	\$10,654,775
What are Actual Savings?	\$9,674,863	\$10,101,698	\$11,788,909	\$10,231,452	\$11,826,618	\$11,141,105	\$10,654,775
What is the Investment per unit?	\$20,542	\$20,542	\$20,542	\$20,542	\$20,542	\$20,542	\$20,542
What is the Finance per unit?	\$20,542	\$20,542	\$20,542	\$20,542	\$20,542	\$20,542	\$20,542
What is the Actual Savings per unit?	\$1,739	\$1,855	\$2,165	\$1,987	\$2,172.41	\$2,114.06	\$2,022
What is the Savings per project (AMP)?	\$312,092	\$325,861	\$380,287	\$310,044	\$381,503	\$371,370	\$355,159
What is the Term of the contract?	20 years (extended 8yrs)	20 years	20 years	20 years	20 years	20 years	20 years
What date was the Request for Proposal issued?	Self-developed did not require a RFP	Self-developed did not require a RFP	Self- developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP	Self-developed did not require a RFP
What was Date Audit Executed?	June 2004 July 2015	July 2018 updated	July 2018 updated	July 2018 updated	July 2018 updated	July 2018 updated	July 2018 updated
What was Date Energy Services agreement executed?	September 28, 2007	Updated March 2018	Updated March 2018	Updated March 2018	Updated March 2018	Updated March 2018	Updated March 2018
What was Date Repayment starts?	July 2009 July 2018	July 2009 July 2018	July 2009 July 2018	July 2009 July 2018	July 2009 July 2018	July 2009 July 2018	July 2009 July 2018
What Types of Energy Conservation Measures were installed at each AMP site?	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation	Mechanical systems upgrades (boilers, chillers, furnaces, a/c units), Lighting, Water saving devices (toilets, shower heads, faucets, water heaters), building automation



2024 Energy Consumption Data

AMP #		Utility Type	Current Year Actual	Utility Unit of	Payable	Actual Utility Costs	Average Utility Rate	Savings
			Consumption	Consumption	Consumption (FRB			
			Section 2, Line 01	Section 2, Line 01a	consumption*)	Section 7, Line 16	Section 7, Line 17	
DC001001030	JAMES CREEK	1-Water & Sewage	27,160	CCF	50,737	\$560,820	\$21	\$ 486,832.13
DC001001030	JAMES CREEK	2-Electric	1,505,564	kWh	2,065,256	\$247,281	\$0	\$ 91,926.48
DC001001030	JAMES CREEK	3-Gas	129,703	Therm	186,024	\$201,553	\$2	\$ 87,520.90
DC001001080	KELLY MILLER DWELLINGS	1-Water & Sewage	27,933	CCF	30,024	\$526,338	\$19	\$ 39,407.17
DC001001080	KELLY MILLER DWELLINGS	2-Electric	858,555	kWh	1,067,913	\$154,700	\$0	\$ 37,723.52
DC001001080	KELLY MILLER DWELLINGS	3-Gas	99,415	Therm	182,763	\$130,805	\$1	\$ 109,666.24
DC001001290	LINCOLN RD	1-Water & Sewage	1,808	CCF	351	\$35,903	\$20	\$ (28,932.81)
DC001001290	LINCOLN RD	2-Electric	209,514	kWh	222,127	\$35,217	\$0	\$ 2,120.13
DC001001290	LINCOLN RD	3-Gas	15,240	Therm	15,265	\$24,754	\$2	\$ 41.26
DC001001291	SIBLEY PLAZA	1-Water & Sewage	27,402	CCF	67,104	\$509,561	\$19	\$ 738,287.46
DC001001291	SIBLEY PLAZA	2-Electric	1,232,613	kWh	2,161,611	\$201,100	\$0	\$ 151,565.71
DC001001291	SIBLEY PLAZA	3-Gas	81,345	Therm	182,414	\$97,679	\$1	\$ 121,362.77
DC001001371	GARIFIELD SENIOR	1-Water & Sewage	12,741	CCF	32,012	\$272,795	\$21	\$ 412,607.05
DC001001371	GARIFIELD SENIOR	2-Electric	1,362,950	kWh	1,928,202	\$259,333	\$0	\$ 107,552.25
DC001001371	GARIFIELD SENIOR	3-Gas	107,124	Therm	187,123	\$123,678	\$1	\$ 92,360.18
DC001001391	LEDROIT APARTMENTS	1-Water & Sewage	9,511	CCF	17,825	\$187,770	\$20	\$ 164,122.05
DC001001391	LEDROIT APARTMENTS	2-Electric	689,234	kWh	934,478	\$117,695	\$0	\$ 41,878.45
DC001001391	LEDROIT APARTMENTS	3-Gas	41,211	Therm	92,431	\$50,719	\$1	\$ 63,038.53
DC001001600	CLARIDGE TOWERS	1-Water & Sewage	48,927	CCF	81,010	\$841,811	\$17	\$ 552,001.59
DC001001600	CLARIDGE TOWERS	2-Electric	1,337,045	kWh	2,137,188	\$205,623	\$0	\$ 123,053.31
DC001001600	CLARIDGE TOWERS	3-Gas	136,743	Therm	159,329	\$144,356	\$1	\$ 23,843.45
DC001001620	HORIZON HOUSE	1-Water & Sewage	13,086	CCF	17,321	\$243,061	\$19	\$ 78,664.46
DC001001620	HORIZON HOUSE	2-Electric	841,514	kWh	1,173,559	\$134,358	\$0	\$ 53,015.13
DC001001620	HORIZON HOUSE	3-Gas	62,125	Therm	74,280	\$69,624	\$1	\$ 13,622.63
DC001001640	FORT LINCOLN	1-Water & Sewage	8,049	CCF	13,953	\$159,435	\$20	\$ 116,943.74
DC001001640	FORT LINCOLN	2-Electric	442,102	kWh	876,187	\$156,239	\$0	\$ 153,405.63
DC001001640	FORT LINCOLN	3-Gas	34,115	Therm	59,735	\$40,314	\$1	\$ 30,274.46
DC001001650	JUDICIARY HOUSE	1-Water & Sewage	21,696	CCF	61,088	\$393,746	\$18	\$ 714,880.40
DC001001650	JUDICIARY HOUSE	2-Electric	1,069,127	kWh	1,711,853	\$148,797	\$0	\$ 89,452.06
DC001001650	JUDICIARY HOUSE	3-Gas	63,504	Therm	148,551	\$74,901	\$1	\$ 100,311.81
DC001001680	HARVARD TOWERS	1-Water & Sewage	17,474	CCF	20,065	\$338,482	\$19	\$ 50,191.21
DC001001680	HARVARD TOWERS	2-Electric	803,378	kWh	1,341,061	\$136,806	\$0	\$ 91,561.09
DC001001680	HARVARD TOWERS	3-Gas	88,603	Therm	110,433	\$99,715	\$1	\$ 24,568.05
DC001001690	REGENCY HOUSE	1-Water & Sewage	11,764	CCF	25,723	\$231,788	\$20	\$ 275,053.64
DC001001690	REGENCY HOUSE	2-Electric	734,992	kWh	1,016,330	\$120,953	\$0	\$ 46,297.96
DC001001690	REGENCY HOUSE	3-Gas	64,108	Therm	80,458	\$74,895	\$1	\$ 19,101.79
DC001001700	JAMES APARTMENTS	1-Water & Sewage	6,284	CCF	16,077	\$122,925	\$20	\$ 191,547.07
DC001001700	JAMES APARTMENTS	2-Electric	899,971	kWh	1,446,084	\$165,609	\$0	\$ 100,493.75
DC001001700	JAMES APARTMENTS	3-Gas	69,539	Therm	83,282	\$77,532	\$1	\$ 15,322.12
DC001002220	BENNING TERRACE	1-Water & Sewage	32,043	CCF	114,126	\$675,459	\$21	\$ 1,730,260.74
DC001002220	BENNING TERRACE	2-Electric	1,103,714	kWh	2,445,274	\$223,980	\$0	\$ 272,246.34
DC001002220	BENNING TERRACE	3-Gas	109,067	Therm	244,217	\$180,352	\$2	\$ 223,482.13
DC001002230	STODDERT TERRACE	1-Water & Sewage	66,501	CCF	63,187	\$1,324,493	\$20	\$ (66,010.41)
DC001002230	STODDERT TERRACE	2-Electric	1,917,691	kWh	2,524,365	\$256,979	\$0	\$ 81,296.82
DC001002230	STODDERT TERRACE	3-Gas	163,331	Therm	220,497	\$231,075	\$1	\$ 80,877.11
DC001002250	LANGSTON TERRACE	1-Water & Sewage	34,388	CCF	69,342	\$671,099	\$20	\$ 682,125.82
DC001002250	LANGSTON TERRACE	2-Electric	1,372,800	kWh	2,302,390	\$224,749	\$0	\$ 152,188.84
DC001002250	LANGSTON TERRACE	3-Gas	150,177	Therm	262,699	\$185,132	\$1	\$ 138,712.40
DC001003361	WOODLAND TERRACE	1-Water & Sewage	54,363	CCF	68,846	\$1,096,456	\$20	\$ 292,111.73
DC001003361	WOODLAND TERRACE	2-Electric	2,778,574	kWh	3,803,469	\$439,589	\$0	\$ 162,145.21
DC001003361	WOODLAND TERRACE	3-Gas	263,785	Therm	414,777	\$320,175	\$1	\$ 183,269.52
DC001003363	CARROLL APARTMENTS	1-Water & Sewage	2,994	CCF	3,854	\$68,605	\$23	\$ 19,697.93
DC001003363	CARROLL APARTMENTS	2-Electric	381,822	kWh	555,175	\$68,556	\$0	\$ 31,125.69
DC001003363	CARROLL APARTMENTS	3-Gas	20,652	Therm	32,663	\$25,057	\$1	\$ 14,573.42
DC001003530	HIGHLAND ADDITION	1-Water & Sewage	19,004	CCF	27,160	\$390,652	\$21	\$ 167,649.43
DC001003530	HIGHLAND ADDITION	2-Electric	847,590	kWh	1,085,826	\$133,574	\$0	\$ 37,544.20
DC001003530	HIGHLAND ADDITION	3-Gas	100,045	Therm	175,098	\$147,127	\$1	\$ 110,373.70
DC001004210	GREENLEAF SENIOR	1-Water & Sewage	30,287	CCF	26,837	\$575,575	\$19	\$ (65,559.81)
DC001004210	GREENLEAF SENIOR	2-Electric	1,975,141	kWh	3,143,582	\$319,155	\$0	\$ 188,803.45
DC001004210	GREENLEAF SENIOR	3-Gas	93,260	Therm	238,120	\$108,693	\$1	\$ 168,831.36
DC001004240	SYPHAX GARDENS	1-Water & Sewage	23,201	CCF	26,321	\$453,902	\$20	\$ 61,049.56
DC001004240	SYPHAX GARDENS	2-Electric	1,111,419	kWh	1,518,487	\$191,463	\$0	\$ 70,125.30
DC001004240	SYPHAX GARDENS	3-Gas	63,669	Therm	143,935	\$79,947	\$1	\$ 100,787.38
DC001004361	KENTUCKY COURTS	1-Water & Sewage	6,866	CCF	9,862	\$148,502	\$22	\$ 64,814.87
DC001004361	KENTUCKY COURTS	2-Electric	591,361	kWh	1,163,077	\$121,776	\$0	\$ 117,731.08
DC001004361	KENTUCKY COURTS	3-Gas	35,569	Therm	76,145	\$45,441	\$1	\$ 51,836.71
Total:							\$ 10,654,775	\$ 10,654,775

Savings	
FRB (52722)	\$ 10,654,775
AoS (52723)	\$ -
RPU (52723) &- RRI?	\$ -
Costs***	
Debt**	\$ 9,333,087.60
Service Fee (M&V)	\$ -
Replacement Costs	\$ -
Total Costs	\$ 9,333,087.60
75% Rule	
75% of FRB+RPU	\$ 7,991,081.55
Cost obligation of FRB+RPU	\$ 9,333,087.60
Over payment	\$ (1,342,006.05)

Initiative 8: Modifications to Methods for Setting Total Tenant Payments and Determining HCV Market Rents and Promoting Deconcentration

Description/Impact/Update

As part of DCHA's ongoing efforts to maximize the resources available for DCHA's customers and to reduce the administrative cost of making these resources available, DCHA:

- Established a new method for setting payment standards; and
- Limited moves so the new lease can only start on the first of a month, thereby avoiding overlapping leases and duplicative payments.

DCHA explored options to enhance the housing authority's ability to encourage voucher participants to exercise their choice in housing, especially related to moving into neighborhoods with low levels of poverty. DCHA created a method for establishing Payment Standards that provides maximum access to neighborhoods across the District based on an annual analysis of unassisted market units that have been rented (not advertised) within each neighborhood in the District of Columbia.

DCHA continues to garner administrative efficiency by limiting moves so the new lease can only start on the first of the month.

The agency continues to establish annual payment standards that provide voucher holders with broad housing options. In FY2019, DCHA set the payment standard at 187% of HUD FMRs. This standard was maintained at 187% for FY2023 and was once again reaffirmed for FY2024 at the same rate for all bedroom sizes. This decision ensures maximum access to neighborhoods across the District of Columbia.

DCHA closed the rent reasonableness portion of this initiative in FY2024 whereby the agency conducted market analysis to set reasonable rents by submarket. The agency procured an industry-standard third party database of rental units to make rent reasonableness determinations based on comparable units (including factors such as location, quality, size, unit type, age of the contract unit, amenities, and utilities provided by the owner). The Administrative Plan updates to accompany this change were approved by DCHA's Board of Commissioners in April 2023 and full implementation of the new procedures was completed in Summer 2023.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024. DCHA will continue to report on agency defined metrics for this activity.

Actual Significant Changes

None.

Status

Implemented and Ongoing.

Metrics

DCHA Defined Metric(s)

The purpose of setting the payment standard in line with the market is to provide voucher holders with maximum housing choice, including moving to the area of the city that meets their family's unique circumstances and aspirations. Overtime, DCHA expects to see payment standards that provide access to neighborhoods across the city (subject to rent reasonableness) to result in a more similar distribution of voucher holders across the city compared to all DC residents, which is what has occurred so far.

Between 2020 and 2024, the percentage of voucher families living in the top five highest-income zip codes in D.C. increased by 65.7%, representing an additional 616 families in these neighborhoods. In contrast, the percentage of voucher families living in the lowest-income zip codes decreased by 5.7% during the same period, indicating increased mobility and greater access to higher-income neighborhoods for voucher holders. Additionally, DCHA served 1,634 more families through vouchers during this time, meaning the decrease in the lowest-income zip codes cannot be attributed to a reduction in the overall number of families served.

Metric	Baseline (FY2020)	Benchmark	Outcome (FY2024)	Benchmark Achieved?
Percentage of voucher holders in the five highest and lowest income zip codes	Highest income zip codes: 321 voucher families	20% increase in voucher families living in highest income zip codes	Highest income zip codes: 65.7% increase	Benchmark met
	Lowest income zip codes: 6,260 voucher families	5% decrease in voucher families living in lowest income zip codes	Lowest income zip codes: 5.7% decrease	

Initiative 11: Site-Based In-Take and Waiting List Management of Public Housing, Redeveloped Properties, and Service Rich Properties

Description/Impact/Update

Due to the close relationship of Initiative 11 (*Applicant Intake Site Designation/ Revised Site-Based Waiting List Policies and Procedures*—formerly 1.10.06, 2.5.04) and Initiative 22 (*Housing Public Housing Residents in Service-Rich Environments*—formerly 3.9.12) with respect to the “Special Purpose” sites and “Service Rich” units, these initiatives were combined. In addition, the initiative has been renamed to better reflect the activities being undertaken.

Mixed Finance

Redeveloped Properties are mixed-finance communities owned by private entities that are created through HOPE VI or other public funding combined with private financing, which have some or all of their units assisted by operating funds provided by DCHA. These properties have site specific in-take and waiting list management policies and procedures.

Traditional Public Housing

This initiative also includes the establishment of centrally managed site-based waiting lists at DCHA’s conventional Public Housing sites to reduce costs and increase housing choices. Currently, when a unit becomes available, an applicant first goes through eligibility determination. Once the applicant is deemed eligible, they are shown the available unit, which could be at any of the Public Housing properties. If the applicant turns down the first unit shown, which often happens, the applicant goes back to the eligible applicant pool and waits for another unit. If another unit is vacant, the applicant is shown a second unit. At this point the applicant must either accept the second unit or be removed from the waiting list (unless the applicant presents acceptable evidence of a hardship).

With the implementation of site-based waiting lists, the process to lease a vacant unit is simplified considerably. When people apply for the site-based waiting list of their choice, they will only be shown units in the property(ies) they want to reside. This will reduce the number of first offer rejections and reduce duplicative staff efforts. It will also increase the household’s ability to exercise housing choice because they can determine in which area or property they will live.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024. All metrics related to the service rich portion of this initiative were closed in the FY2024 MTW Plan.

Actual Significant Changes

In the FY2024 MTW Plan, DCHA closed the service rich portion of this initiative whereby the agency created supportive, service-intense sites that serve special needs populations in partnership with service providers who brought additional funding to create these service-rich environments, such as Medicaid. DCHA had implemented this initiative at a converted 14-unit building assisted living site called the Marigold (2905 11th Street NW). After facing significant operating challenges with the original operator and additional occupancy challenges from the pandemic, DCHA worked closely with the most recent operator to assess the site’s financial viability. In 2023, DCHA closed the facility based on this analysis and expanded affordable,

assisted living options in the District. DCHA worked closely with each of the remaining eight residents to ensure a smooth transition to new housing.

Status

Implemented and Ongoing.

Initiative 12: Rent Simplification and Collections

Description/Impact/Update

DCHA explored various ways to simplify the rent calculation and collections models. As part of its exploration, DCHA looked at self-certification of assets and excluding local stipends for grandparents. The goal of this initiative was to build on existing rent simplification models to design a model that simplifies the calculation process and lessens the burden of rent calculations for the neediest families.

As Phase 1 of this initiative, DCHA implemented the following as part of DCHA's Rent Simplification strategy:

- Self-certification of Assets less than \$15,000, including an increase in the threshold for reporting Assets.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing.

Initiative 17: Change in Abatement Process, including Assessment of a Re-Inspection Fee as an Incentive to Maintain Acceptable Housing Quality Standards in Voucher Assisted Units

Description/Impact/Update

DCHA is required to conduct a re-inspection for units that fail an annual HQS inspection to ensure that the owner has corrected the violations. If the landlord does not correct the violations by the time of the re-inspection, DCHA must abate the landlord's payment and terminate the HAP contract. In FY2010, DCHA conducted third inspections on more than 7% of its HCV units.

Prior to termination of the HAP contract (which is typically 30 days from the abatement), if the owner wants DCHA to come out for a third inspection, DCHA is using its MTW authority to charge the landlord a fee for the third inspection. The current fee for the third inspection is \$100.00. The fee for the inspection does not remove the abatement of the subsidy; rather,

DCHA is seeking to impose this fee due to the administrative costs of conducting an inspection that is not required. If the unit passes after the third inspection, DCHA will lift the abatement effective the date the unit passed.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024. DCHA will continue to report on agency defined metrics for this activity.

Actual Significant Changes

There were no actual significant changes in FY204.

Status

Implemented and Ongoing.

Due to the ongoing impact of the pandemic and the development of a payment system, landlords were not charged for third inspections during FY2023. As set forth in the FY2024 MTW Plan, in DCHA re-instated the fee and increased the fee to \$100 in FY2024.

Metrics

DCHA Defined Metric(s)

Metric	Baseline (FY2011)	Benchmark	Outcome (FY2024)	Benchmark Achieved?
Number of annual abatements	2,155	10% (215) reduction in abatements in initial year, with further small reductions thereafter	N/A	Benchmark met
Number of 3 rd inspections	983	10% (98) reduction of number of 3 rd inspections in initial year of implementation, with further small reductions thereafter	N/A	Benchmark met

Initiative 18: Creation of Local Authorization and Release of Information Form with an Extended Expiration to Support the Biennial Recertification Process

Description/Impact/Update

With the move to biennial recertifications for both the HCV and Public Housing programs, a longer release of information authorization was needed. Using the HUD standard Form 9886 (HUD 9886) release form, income data provided for Public Housing and Housing Choice Voucher program participants through the HUD Enterprise Income Verification (EIV) system is only accessible for 15 months with a signed HUD Form 9886 (HUD 9886). The HUD 9886 is a release of information authorization signed by every adult member of the household. The HUD 9886 gives DCHA the ability to conduct third party verifications of income for up to 15 months from the date the adult members complete the form. If resident/participant data is not accessed within the 15 month period, DCHA lost the ability to run the third party income data.

DCHA has developed a local form that gives the Agency the authority to conduct third party verifications of income for each adult member for 36 months instead of 15 months as long as said member remains a part of the household composition of the assisted household and the household continues to participate in a DCHA program. This form is executed for each adult member of the participating household and conforms with 24 CFR 5.230 as required to access EIV. The packet sent to each participating household at the time of re-certification contains a reminder that the authorization form was previously signed.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing.

Initiative 20: Enhance Neighborhood Services within Public Housing Communities

Description/Impact/Update

As a means to better integrate Public Housing developments into surrounding communities while encouraging self-sufficiency, DCHA will convert Public Housing dwelling units into non-dwelling units to create space for providers of services that help DCHA residents/participants achieve self-sufficiency. These units will be classified as MTW Neighborhood Services Units in PIC. Many of these providers will serve both Public Housing residents and members of the surrounding community, including HCV participants, reducing the isolation that characterizes many Public Housing developments. In addition, the on-site services will augment those services available elsewhere in the community so available resources are used efficiently and residents are encouraged to leave the community to meet some of their needs.

Working with Resident Councils to identify needs, opportunities and resources, DCHA designated 54 units as MTW Neighborhood Service Units to provide space to organizations providing a range of services. The 48 units on the top two floors of Sibley Plaza a Mixed Population elderly/ disabled community are used by Safe Haven, Inc. a local faith-based nonprofit, to provide meals, drug treatment, counseling, health care services and transitional housing to residents of the transitional housing and to members of the larger community. The other six units are spread across four additional properties.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no significant changes in FY2024.

Status

Implemented and Ongoing.

Safe Haven is no longer operating at Sibley Plaza and the units will be put into MOD status. DCHA is assessing its use of MTW Neighborhood Services units and will provide an update in its FY2025 MTW Plan.

Metrics

DCHA Defined Metric(s)

Metric	Baseline (FY2011)	Benchmark	Outcome (FY2024)	Benchmark Achieved?
Number of residents served by MTW Neighborhood Service Units	0	At least 30 program residents served per service provider	n/a no service providers to report at this time	n/a

Initiative 23: Encourage the Integration of Public Housing Units into Overall HOPE VI Communities

Description/Impact/Update

Many of DCHA's Mixed Finance communities include rental Public Housing units and market rate homeownership units. This often causes disagreements and misunderstandings that can best be resolved by bringing all the residents together in a Community Association.

Currently many of our Mixed Finance properties have Homeowner and Tenant Associations (HOTAs)/Community Associations. They are not as effective as they could be because the dues structure does not provide an adequate operating budget to engage in community building activities. With the implementation of this Activity, a budget will be developed that will allow the HOTAs/Community Associations to become an effective force in equitably governing and unifying the community. A community with a healthy, equitable Community Association is a truly mixed-income community, rather than several communities segregated by income level or housing tenancy that exist in physical proximity to each other. When a truly mixed income community is thus created it creates real housing choice for DCHA's low-income clientele.

In order to be full-fledged members of the community, Public Housing residents, or their landlords on behalf of the Public Housing residents, must pay HOTA dues to ensure that the community is well- maintained and that a forum for discussing and resolving differences is always available.

Similar to the mechanism planned to allow the provision of selected service-rich environments, DCHA is utilizing its authority for rent simplification to ensure that residing in these units is affordable even though the property has greater expenses than is typical in Public Housing. DCHA will adopt local rent calculation regulations that allow the managers of Mixed Finance properties to establish an income-based rent and fee structure that ensures that the rents and fees, including HOTA fees, are no more than 30% of adjusted income. Each public housing

tenant will be given a HOTA dues allowance similar to a utility allowance, thus reducing the total rent charged so the cost of the dues will not increase the tenant's housing expenses.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024. DCHA will continue to report on agency defined metrics for this activity, but has removed the metric on REAC scores, as HUD's new NSPIRE inspection protocol does not provide scores for common areas.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing. Currently, DCHA pays HOTA fees directly rather than as an allowance.

Metrics

DCHA Defined Metrics

Metric	Baseline (FY2011)	Benchmark	Outcome (FY2024)	Benchmark Achieved?
Number of community-wide events sponsored by HOTAs	0	At least 2 community-wide events annually	0 community-wide events held	Benchmark not met

Initiative 25: Local Blended Subsidy

Description/Impact/Update

For over a decade, DCHA has undertaken an aggressive redevelopment program to both replace and revitalize its public housing. As DCHA continues its efforts to replace units demolished and disposed of, as well as reconstruct existing functionally and physically obsolete housing, it intends to use its MTW authority to improve its ability to leverage public and private investment in order to meet its capital improvement needs. With diminished appropriations to support the management, operation and long-term capital replacement requirements of public housing, it is critical that effective approaches to financing development and redevelopment of public housing communities be created to replace losses in public funding. Accordingly, DCHA proposes in certain cases to blend its MTW section 8 and public housing funds to subsidize units reserved for families earning at or below 80 percent of Area Median Income (AMI). This is done to create an operating expense level which is adequate to provide essential operating services while also supporting debt to meet capital needs in a manner structured to maximize the amount of equity (primarily through Low Income Housing Tax Credits "LIHTCs") available to redevelop or replace public housing with minimal public housing capital funds. Public housing authorities have long used Project Based Vouchers (PBVs) in a similar manner, but DCHA

proposes using a more efficient, effective and targeted approach using MTW authority through a Local Blended Subsidy (LBS) Program.

DCHA is flexible in its approach to using LBS to both upgrade and redevelop certain existing public housing sites, as well as to create new replacement housing. The LBS is targeted to developments where the units require a subsidy level other than that available through the traditional public housing program and/or would experience operational and administrative inefficiencies due to a combination of different housing types.

As a part of the analysis, DCHA reviews comparable properties to assist in determining budgets that are reasonable and appropriate for the housing being operated as well as the characteristics of the households being served. The approach is to structure the LBS where it uses comparable standards which approximate the PBV program and/or offer a total expense level which creates no “overhang” in the total aggregate amount of MTW funds being provided (compared to LIHTC and/or market rent levels) so as to minimize reserve requirements while maximizing permanent debt and equity commitments as well as in some cases, the level of cross subsidization from privately financed unassisted units within the same development. The high amount of leverage obtained for these redevelopment projects is evidenced in the financing proposals submitted to HUD which also reflects that LBS is being used in a manner which minimizes risk to DCHA.

DCHA recognizes any project for which LBS is utilized will need to be subjected to a Subsidy Layering Review (SLR) or other appropriate analysis by HUD. Given DCHA’s experience with The Lofts and Highland, DCHA is confident that any future projects will meet HUD’s subsidy layering review and analysis requirements.

DCHA has developed an extraordinary capability in the development and redevelopment of its public and assisted housing. It intends to pursue both co-development (with private and non-profit partners) and self-development using LBS. In pursuing these types of programs, DCHA has and will continue to develop direct relationships with lenders and investors. Moreover, in making commitments for these projects, DCHA has developed a formalized structure for minimizing any risks in these transactions to DCHA through an effective use of affiliates (instrumentalities) in the development and ownership structure. Further, to help insure the integrity and transparency of this process, DCHA has instituted a formal review process that is overseen by an investment committee which approves each of these types of development transactions whether or not LBS is utilized.

DCHA understands the following as it relates to the key aspects of utilizing MTW authority in this way:

- The authority to combine subsidies would only last through the term of the MTW Agreement which is currently set to expire, unless it is extended. If the MTW Agreement expires, DCHA will work with HUD pursuant to the MTW Agreement to have this initiative extended; commit to convert the projects to traditional public housing or seek to convert some or all of the units to PBVs; or utilize the Rental Assistance Demonstration (RAD) or similarly structured program permitted by HUD.
- DCHA ensures all financial partners are aware of the subsidy structure and the implications of using this financial model. This would be evidenced in the financing documents as appropriate or a signed document.

- DCHA is subject to the traditional process required under 24 CFR Part 941 and anticipates that any debt structure would be subject to HUD review as HUD deems appropriate. DCHA further understands that LBS would have an impact on the Replacement Housing Factor (RHF) funds received and there are limitations for using capital funds for debt service.
- Where LBS results in adding public housing units, this would increase the agency baseline.
- If subsidies are combined within one unit, the unit would be considered public housing for purposes of regulatory compliance.

DCHA's LBS is intended to increase housing choice for low-income families and to provide housing of improved quality and type for low-income families.

Under this initiative, DCHA has received approval for LBS flexibility for six projects:

- Highland Dwellings (approved as part of FY2014 MTW Plan)
- The Bixby (formerly Lofts at Capitol Quarter) (approved as part of FY2014 MTW Plan)
- Park Morton/Bruce Monroe (approved as part of FY2019 Plan)
 - Two sites that are a part of the overall development of Park Morton • Kenilworth Courts Phase 1 (approved as part of FY2020 Plan)
- Barry Farm (approved as part of FY2022 Plan)
- Sursum Corda Turnkey and Sibley Townhomes (approved as part of FY2023 Plan)

In the FY2024 plan, DCHA removed all properties from this initiative, except for Highland and the Bixby, which have already been implemented. This initiative pre-dated HUD's Restore-Rebuild (formerly Faircloth-to-RAD) conversion tool and DCHA has determined that the flexibility granted by LBS is no longer necessary for the redevelopment of Park Morton/Bruce Monroe, Barry Farm, and Sursum Corda Turn Key/Sibley Townhomes. Instead of blending funds to fully support public housing operations, DCHA will utilize its MTW single fund fungibility to increase the base value of vouchers during and after the transition from new public housing units to RAD PBV units for these properties under HUD's Restore-Rebuild program.

The following provides descriptions and statuses of the LBS projects.

Initial Projects Completed Using LBS

- **The Bixby (formerly Lofts at Capitol Quarter)**
No public housing capital funds were used to create the 39 units of new replacement public housing units to be operated in accordance with public housing requirements. The total development cost of this project was approximately \$12 million fully covered with a capital contribution from the market component of \$2.5 million, a \$5.4 million permanent loan from Citi Community Capital, and approximately \$4 million in tax credit equity from RBC. The leverage on The Bixby is evidenced by a permanent loan and the capital contribution to the construction cost of the affordable units from the market component.

DCHA provided supplemental MTW Block Grant funding which will fund the difference between an amount not to exceed 110% of area wide FMR and the total expense level computed in accordance with the Operating Fund Rule. Specifically, the terms for this project provide that the DCHA provide MTW funds up to an expenses level equal to

110% of FMR or the amount needed to cover operating costs, debt service, incentive management fee and required reserves (i.e., replacement reserves), whichever is less. Moreover, any excess funds will be returned to DCHA based on an annual audit and true up. Any program income generated by the affordable units is used for MTW purposes. The estimated MTW block grant funds needed on an annual basis is just over \$400,000 which is covered by the cash flow to be earned by DCHA on the market component of this project as evidenced in the Rental Term Sheet provided to HUD.

With respect to the LBS used on The Bixby, the funding equates to approximately 32 fewer vouchers being utilized. Cash flow on the market units in this project is expected to be realized after the first year of utilizing LBS. At that point, the revenue will eliminate the need for LBS and those funds will be available to assist additional families.

- **Highland Dwellings**

Work at Highland consisted of a combination of rehabilitation and new construction of 208 low-income units where between 70-75% of the capital funds were generated through private debt and equity. The total development cost for this project was approximately \$62 million and the debt and equity raised using LBS was over \$46 million (consisting of a permanent loan from Capital One of approximately \$21.6 million and tax credit equity of approximately \$25 million from Wells Fargo).

Similar to The Bixby, Highland did not use MTW funds for capital costs, but MTW Block Grant funds are used to supplement funds available for the 208 ACC units through the Operating Fund Rule. The estimated annual MTW Block Grant funds are approximately \$1.7 million (as indicated in the Rental Term Sheet submitted to HUD for this project). The amount of MTW Block Grant funds is essentially equal to the amount previously modeled when the project was proposed to be 125 ACC units and 83 PBV units. This enabled DCHA to obtain subsidy for all units under ACC while providing no more funds than would have been provided as HAP funds using its MTW Block Grant. This was done as the previous method for financing the project was tremendously inefficient as it layered an extreme overhang for the PBV units creating millions of dollars in investor reserve requirements over and above that required using LBS, while generating significantly less tax credit equity and debt financing. Thus, LBS enabled the project to be redeveloped in a much more comprehensive manner. For example, rather than up to \$3 million in affordability reserves being required, there was only \$1 million required by investors. As opposed to generating approximately \$24 million in debt and equity, the project generated over \$46 million. The rents levels can be up to 110% of FMR; however, rent levels are modeled at an amount approximating Low Income Tax Credit (LIHTC) rents, which are well below 110% of FMR. Therefore, DCHA has and intends to use its LBS authorization in a manner that maximizes funds for its redevelopment while minimizing the funds required to achieve needed investor and debt contributions.

The LBS used on Highland equated to 83 fewer utilized vouchers. This has given DCHA the ability to preserve existing public housing with this private capital infusion and frees-up future capital funds due to the properties self-sufficiency with meeting its capital needs. In addition, this has given DCHA the ability to utilize its capital funds from Highland to serve an additional 40 families.

This development is operated in accordance with public housing requirements.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

In its FY2024 MTW Plan, DCHA removed the properties that had not yet implemented this initiative: Bruce Monroe/Park Morton, Kenilworth Phase 1, Barry Farm, Sursum/Sibley. This initiative pre-dated HUD's Faircloth-to-RAD conversion tool (now Restore-Rebuild), and DCHA finds the flexibility granted by LBS is not necessary beyond those for which it has already been implemented.

Status

Implemented and Ongoing: Highland and The Bixby

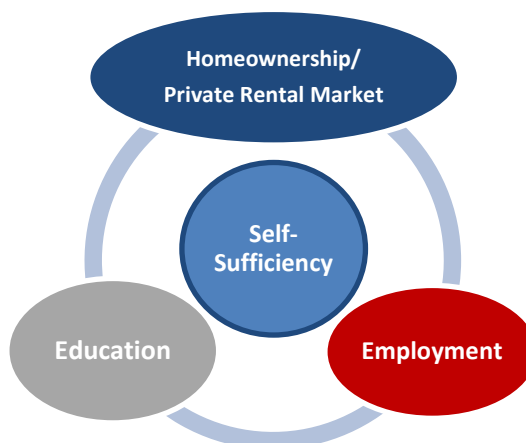
Initiative 32: Modifications to the HCV Family Self-Sufficiency Program

Description/Update

DCHA is committed to providing all the residents served by the agency's housing programs with opportunities for achieving economic independence and self-sufficiency. Understanding that one size does not fit all when it comes to the resources and supports a family may need to improve their economic condition, DCHA's self-sufficiency platform consists of a suite of resources and incentives that when accessed provide pathways to employment, education and homeownership/unassisted rental.

DCHA has re-tooled its self-sufficiency program and implemented a more effective incentive structure to motivate families toward self-sufficiency. As part of this initiative, DCHA has transitioned from the traditional FSS model to one that aligns with its multi-pronged approach to supporting families. Specifically, DCHA has created an incentive framework that eliminates the traditional escrow model, utilizing MTW authority. The new program provides investment incentives such as income exclusions, rent caps, educational stipends, mortgage down payment or rental grants, and employment grants, tailored to the specific self-sufficiency pathway chosen by families.

Figure 1. DCHA Pathways to Achieving Self-Sufficiency



DCHA anticipates the following with the implementation of this initiative:

- A simpler program design and clearer incentive structure making it easier for clients to make decisions about their participation. Program Incentive Investments (i.e. homeownership down payment, rental market grants and tuition subsidy and employment incentive) will be known to the client when weighing the decision to apply for the program.
- DCHA will be able to better anticipate incentive program costs because the new incentive structure will be simpler and less variable.
- With an incentive structure tailored to DCHA's pathways to self-sufficiency, DCHA expects to see more families:
 - Moving off the voucher subsidy completely
 - Increasing earnings
- Making housing subsidy available to house families from the HCVP waiting list as families move off of the program.
- Elimination of the administrative burden of calculating and maintaining escrow accounts.

Pathways to Self-Sufficiency —Incentive Model

Pathway (Primary Goal)/ Participation Elements	Homeownership/Rental in the Private Rental Market	Education	Employment
Incentives	\$2,000/year set-aside for each year in the DCHA Self-Sufficiency Program Disbursed upon successful completion of the program (maximum disbursement = \$10,000) • Homeownership—in time for settlement • Private Rental Market—approval for a lease If a family needs a voucher to purchase a home, they will also be enrolled in the HCV Homeownership Assistance Program.	A maximum of \$2,000 made available each year to be paid by DCHA toward tuition at a community college, four year college, professional certification or vocational training program. DCHA will make tuition payments directly to the educational institutions Earned Income exclusion from calculation of rent (using \$ from rent for education prep and tuition)	Tenant portion of rent will remain the same as long as the family is in the program \$600 for each 12 months of consecutive part-time/full-time employment
Basic eligibility	Households with incomes between 50% and 80% of median income range, depending on household size = \$41,050-\$102,250 @ least \$32,000 in earned income (HOH and spouse)	GED or High School Diploma Pass an educational readiness assessment Part-time employment	Head of Household has \$0 earned income
Program Length	Up to 5 years	Up to 5 years	Up to 5 years
Program Size (initial) Based on staff capacity (1:50 ratio)	100	50	50

Pathway (Primary Goal)/ Participation Elements	Homeownership/Rental in the Private Rental Market	Education	Employment
The program will maintain financial literacy as a core component across pathways.			

Households not meeting the eligibility requirements for this component of the DCHA self-sufficiency program have access to the suite of resources made available through DCHA's Workforce Development Initiative (WDI) headquartered at the agency's Southwest Family Enhancement and Career Center.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and ongoing.

Enrollment into the homeownership and education pathways is ongoing. In FY2024 156 individuals were enrolled across the pathways, 5 participants graduated from the program, and 5 participants had their FSS contracts terminated due to inability to complete the Contract of Participation.

Initiative 33: Waiver for Third Party Housing Quality Standards (HQS) Inspections

Description/Impact/Update

The District of Columbia Housing Authority (DCHA) Housing Choice Voucher Program (HCVP) inspections division staff perform Housing Quality Standards inspections on DCHA-owned and DCHA-affiliate units that receive voucher assistance rather than using third-party inspectors. Prior to this initiative, HCVP used the assistance of a third-party inspections contractor, which slowed the leasing process and caused delays on quality control and emergency inspections. This initiative is intended to create greater efficiencies and expedite the lease-up process for families in need of housing.

Quality control inspections are performed during the year. Units are randomly selected that have been inspected within the last quarter/90-days. If deficiencies are found, the landlord is notified to correct the deficiencies and the inspector who initially conducted the inspection receives one-on-one coaching and a review of HQS procedures. The inspection manager may also determine that the inspector is required to obtain additional HQS training.

Actual Non-Significant Changes



There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

There were no actual significant changes in FY2024.

Status

Implemented and Ongoing.

Initiative 34: Local Elderly Family Definition

Description

Using MTW flexibility, DCHA proposed this new, local definition of “elderly”: any family whose head of household, co-head, or spouse is age 55 or above. By adopting the local definition of elderly, DCHA will expand housing choice for near-elderly individuals, which offers focused service delivery and improved options for aging-in-place.

For the purpose of referring families to units in certain public housing or project-based elderly or elderly/disabled building, DCHA will use the above local definition of “elderly.” This definition will also be used for properties during the Restore-Rebuild (formerly Faircloth-to-RAD) conversion process.

Modifying the definition of elderly reflects the way our public housing buildings currently operate, wherein 15.6% of our senior/disabled building population is already in the 55-61 range.

Actual Non-Significant Changes

There were no non-significant changes in FY2024.

Actual Changes to Metrics/Data Collection

In compliance with the updated HUD Form 50900, the HUD Standard Metrics for this activity have been removed in FY2024.

Actual Significant Changes

This activity was proposed and approved by HUD in the FY2024 MTW Annual Plan.

Status

Implemented and ongoing.

DCHA anticipates implementing this initiative in public housing sites, RAD conversions, and PBV transactions, including as referrals are made to the owners of units in project-based buildings with an elderly preference.

B. Not Yet Implemented

New Number	Old Number	Activity	Statutory Objective	FY Approved	FY Implemented

At the end of FY2024, DCHA did not have any activities not yet implemented.

C. On Hold Activities

New Number	Old Number	Activity	Statutory Objective	FY Approved	FY Implemented

At the end of FY2024, DCHA did not have any activities on hold.

D. Closed Out Activities

MTW Activity		Fiscal Year			Close Out
Number	Name	Approved	Implemented	Closed	Reason/Outcomes
1.2.04	Locally Defined Site and Neighborhood Standards	2004	2004	2011	MTW flexibility was not necessary to establish local site & neighborhood standards for HOPE VI developments.
2.4.04	Special Occupancy for Service Providers	2004	N/A	2005	Activity closed following resident and community feedback.
3.1.04	Voluntary Resident Community Service	2004	N/A	2004	Closed following HUD legal determination that the community service requirement was not subject to the MTW Standard Agreement.
3.2.04	Resident Satisfaction Assessment	2004	2004	2004	Activity was found to be too cost prohibitive to continue in future years.
1.7.05	Security Deposit Guarantee Program	2005	N/A	2010	Closed due to MTW funding limitations and lack of local funds to supplement the activity.



MTW Activity		Fiscal Year			Close Out
Number	Name	Approved	Implemented	Closed	Reason/Outcomes
1.8.05	Modification to HCV Inspections Scheduling	2005	N/A	2006	Upon exploration, DCHA could not find sufficient patterns of consistency among landlords or properties to justify reducing inspection frequency. Due to the high failure rate of HQS inspections and the age of the housing stock, the benefits of annual inspections outweighed any potential cost savings.
Current: 6 Previous: 2.3.04 & 2.5.05	Modifications to Pet Policy	2005	2005	2016	DCHA was informed by HUD that the approval it received in 2005 for this activity was being rescinded. This decision was based on an evaluation of the relevance of Section 227 of the Housing and Urban-Rural Recovery Act of 1983 (12 U.S.C. 1701r-1) and its implementing regulations under 24 CFR Part 5 Subpart C, as they applied to DCHA's use of its MTW authority to establish its pet policy.
3.3.05	Streamlining Resident Community Service	2005	2005	2012	DCHA closed the activity with the intention of re-thinking it's approach to the policy. DCHA may re-introduce a new activity in the future.
9	Streamlined Operating Subsidy Only (OPERA) Protocol—Operating Assistance for Rental Housing	2005	2005	2016	DCHA was unable to successfully utilize the authority provided by this initiative and decided to close it out.
Current: 10 Previous: 3.4.05	Supporting Grandfamilies	2005	2005	2016	Based on local designation of grandparent stipends, there is no need to provide an exclusion for these payments under MTW authority, as HUD guidelines already allow for it.
4.2.05	Revolving Loan Fund for HCV Landlords	2005	N/A	2009	Closed due to MTW funding limitations and lack of local funds to supplement the activity.
4.3.05	Flexible Funding	2005	2005	2010	A standalone activity was not required as funding flexibility is included in the MTW Standard Agreement.



MTW Activity		Fiscal Year			Close Out
Number	Name	Approved	Implemented	Closed	Reason/Outcomes
4.4.06	Reformulation of HUD Forms	2006	2006	2010	DCHA found that while it may be necessary to modify HUD forms as part of an MTW initiative in the future, this initiative, in and of itself, does not address any of the three statutory objectives. If modifications to HUD forms are required, that action will be proposed as part of a specific MTW initiative.
Current: 13 Previous: 2.6.07	Enhanced Public Housing Lease Enforcement Operations	2007	2007	2012	Closed due to lack of progress in implementing this activity. DCHA still remains committed to providing the residents the flexibility in establishing property specific community rules. In the future, if there is renewed interest to move forward by resident councils the initiative will be resubmitted for HUD approval.
1.11.08	Maximizing Public Housing Subsidies	2008	N/A	2008	DCHA explored combining ACC's in order to generate more adequate public resources to support rising public housing operational costs, however the agency decided not to move forward with the activity as proposed.
Current: 14 Previous: 3.6.08	Streamlining the Transition from Project-Based to Tenant-Based Vouchers	2008	2009	2012	N/A
Current: 15 Previous: 3.7.08	Reform Housing Quality Housing Standards	2008	N/A	2018	Based on DCHA's final assessment, the agency determined this activity was no longer viable due to variability of inspection results across agencies.
Current: 21 Previous: 2.10.12	DCHA Local Mixed Subsidy Program	2012	N/A	2016	This activity was initially proposed to support the redevelopment of Highland Dwellings. DCHA identified a more effective financing strategy (see <i>Initiative #25: Local Blended Subsidy</i>) and therefore this activity was never implemented.



MTW Activity		Fiscal Year			Close Out
Number	Name	Approved	Implemented	Closed	Reason/Outcomes
26	Local Investment Policy	2014	N/A	2017	DCHA decided to close this initiative, as ongoing review of investments and potential returns did not justify proceeding with this activity.
30	HQS Scheduling	2015	N/A	2017	DCHA closed this initiative as the flexibility it granted was no longer needed based on the projected number of eligible landlords/owners under the <i>HQS Biennial Inspections for Landlords in Good-standing</i> (Initiative #29) MTW activity.
28	Rent Reform Demonstration (HCVP)	2014	2014	2020	DCHA was selected to participate in the Rent Reform Demonstration commissioned by HUD to evaluate alternative HCV rent reform policies. Following the completion of the demonstration study, DCHA transitioned participating residents back into the traditional HCV program. DCHA closed the activity, as its objectives were completed. Outcomes and metrics from the demonstration can be found in DCHA's FY2023 MTW Annual Report and in the Rent Reform Demonstration reports on the HUD website.
29	HQS Biennial Inspections for Landlords in Good-Standing	2015	2018	2020	DCHA closed this activity because MTW flexibility to implement HQS biennial inspections is obsolete due to changes in regulation. DCHA will follow the guidelines as set forth in the FY2014 omnibus appropriations bill and accompanying federal register notices.
Current: 19 Previous: 4.5.11	Establishment of Resident Driven Community Based Programs to Improve Customer Service and Foster Greater Resident Empowerment	2011	N/A	2023	DCHA closed this initiative because it implemented alternative engagement strategies for senior residents across its portfolio.



MTW Activity		Fiscal Year			Close Out
Number	Name	Approved	Implemented	Closed	Reason/Outcomes
27	Family Stabilization through Housing and Education Demonstration	2014	N/A	2023	DCHA closed this initiative because the agency refers youth to the District of Columbia Office of the State Superintendent of Education (OSSE) truancy program.
Current: 2 Previous: 1.3.04	Designation of Elderly-Only Properties	2004	2004	2023	DCHA closed this initiative in acknowledgement of HUD's decision, as transmitted via its review on September 30, 2022, that the MTW Standard Agreement does not provide authorization to waive the Designated Housing Plan regulations. The Agency is submitting a Designated Housing Plan for HUD review for the applicable sites.
Current: 5 Previous: 2.2.04	Modifications to Market-Based Rents	2004	2004	2023	DCHA closed this initiative in acknowledgement of HUD's decision, as transmitted via its review on September 30, 2022, that the MTW Standard Agreement does not provide authorization to set a different flat rent rate or remove resident choice, even when intended to benefit residents. The agency updated its ACOP in FY2023 to provide residents with an annual choice of flat or income-based rents. DCHA never implemented the Local Public Housing Flat Rent Schedule as approved under this initiative.
Current: 16 Previous: 2.7.11	Requirement to Correct Minor HQS Unit Condition Discrepancies— Tenant/Landlord Self-Certification	2011	2012	2023	DCHA closed this activity because it is obsolete. DCHA does not rely on self-certifications and instead re-inspections occur immediately following the corrective period. As was the goal, no voucher participants were allowed to move/transfer without corrected minor violations and no landlords were granted a rent increase while this initiative was fully implemented.



MTW Activity		Fiscal Year			Close Out
Number	Name	Approved	Implemented	Closed	Reason/Outcomes
34	Virtual Housing Quality Standards (HQS) Inspections	2021	2021	2023	DCHA closed this activity because the MTW flexibility to implement virtual/remote video inspections is obsolete due to changes in regulation. DCHA will follow the guidelines as set forth in PIH Notice 2020-31.
24	Simplified Utility Allowance Schedule	2012	2014	2024	Effective July 2023, DCHA reverted to the standard HCV operations requirements of completing a utility allowance study annually and updating the utility allowance schedule accordingly. This initiative was closed in the FY2024 plan.
31	Unit Protection Incentive Program	2018	N/A	2024	DCHA closed this initiative in its FY2024 plan since the HALO program is no longer active.

V. Planned Application of MTW Funds

A. Financial Reporting

i. Available MTW Funds in the Plan Year

DCHA has submitted unaudited and audited information for in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA).

ii. Expenditure of MTW Funds in the Plan Year

DCHA has submitted unaudited and audited information in the prescribed Financial Data Schedule (FDS) format through the Financial Assessment System – PHA (FASPHA).

iii. Describe Application of MTW Funds

Description of MTW Funding Flexibility
Single-Fund Budget Flexibility was used to meet many of the Agency's goals under the MTW Program. In FY2024 as in previous years, DCHA used grant funds to achieve the following: • Provide funding to maintain Public Housing operations and to undertake much needed modernization and repair of deferred maintenance matters necessary to keep/bring units on-line for occupancy; • Operate the agency's workforce development center; • Operate the agency's Customer Call Center; and • Purchase and maintain public safety equipment and tools to improve safety and security in and around DCHA's Public Housing communities.

B. Local Asset Management Plan

Local Asset Management Plan	
Did the MTW PHA allocate costs within statute in the Plan Year?	No
Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?	Yes
Did the MTW PHA provide a LAMP in the appendix?	Yes
If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year.	See Appendix A for narrative description of DCHA LAMP

VI. Administrative

A. Reviews, Audits, and Inspections

HUD approved DCHA's Lead Action Plan ("LAP") December 26, 2020. DCHA has provided monthly updates to HUD on the LAP by the fifth of each month since February 2020. The reports are included in Appendix B. The pandemic impacted the proposed timelines in the LAP approved by HUD, and DCHA includes any proposed changes to the LAP in the monthly report. DCHA continues to address issues identified by risk assessments in accordance with the HUD-approved plan.

During March 2022, HUD conducted an on-site assessment, results of which were shared with the agency September 30, 2022. The purpose of the review was to assess DCHA's performance managing its Public Housing and Housing Choice Voucher (HCV) programs. The review also assessed DCHA's compliance with HUD program requirements and regulations including DCHA's Moving to Work (MTW) Standard Agreement. The review team was comprised of eight HUD Office of Public and Indian Housing (PIH) staff members from the Northeast Network and the Deputy Director of the MTW Demonstration program. The team reviewed documents remotely and on site. The team also reviewed resident files on site, conducted interviews with management staff, maintenance staff, Board members, and residents, and inspected developments. The staff reviewed areas of operations including Governance, Public Housing and HCV programs, Finance, as well as Procurement and Repositioning. The team identified 82 Findings, 26 Recommendations and five Observations related to DCHA programmatic operations. DCHA worked throughout FY2024 to close out remaining findings and recommendations. As of the date of the FY2024 MTW Annual Report submission, 9 recommendations remain open, most of which relate to the revised ACOP and Administration Plan. DCHA plans to complete these in FY2025 following the appropriate public process.

During FY2023, HUD continued a rent reasonableness investigation and a Fair Housing/Equal Opportunity (FHEO) review. The results of both were reported to DCHA in FY2024.

B. Evaluation Results

Provide a description of the results of the latest MTW PHA-directed evaluation, or statement that there are none.

Rent Reform Demonstration

In 2014, DCHA was selected to participate in a demonstration commissioned by the U.S. Department of Housing and Urban Development (HUD) to evaluate a Housing Choice Voucher (HCV) alternative rent reform policy (the "Demonstration"). MDRC, a nonprofit and nonpartisan education and social policy research organization, conducted the Demonstration on behalf of HUD.

The goals of this alternative rent policy were to:

- Create a stronger financial incentive for tenants to work and advance toward self-sufficiency
- Simplify the administration of the HCV Program
- Reduce housing agency administrative burden and costs

- Improve accuracy and compliance of program administration
- Remain cost neutral or generate savings in HAP expenditures relative to expenditures under traditional rules
- Improve transparency of the program requirements

The proposed alternative rent policies included the following five key features:

- Simplify income determination and rent calculation of the household's Total Tenant Payment (TTP) and subsidy amount by:
 - a) Eliminating deductions and allowances,
 - b) Changing the percent of income from 30% of adjusted income to a maximum of 28% of gross income,
 - c) Ignoring income from assets when the asset value is less than \$25,000,
 - d) Using retrospective income, i.e., 12-month "look-back" period and, in some cases, current/anticipated income in estimating a household's TTP and subsidy, and
 - e) Capping the maximum initial rent burden at 40% of current gross monthly income.
- Conduct triennial income recertification rather than biennial recertification with provisions for interim recertification and hardship remedies if income decreases.
- Streamline interim recertifications to eliminate income review for most household composition changes and moves to new units.
- Require the Family Share is the greater of TTP (see #1 above) or the minimum rent of \$75. A portion of the Family Share will be paid directly to the landlord.
- Simplify the policy for determining utility allowances. Additionally, the Demonstration offered appropriate hardship protections to prevent any Demonstration Study Group member from being unduly impacted

DCHA ended its participation in the demonstration study in 2019. Results from DCHA's participation can be found in the Interim Report. Full results from the study can be found in the Final Report, released in March 2024.

C. MTW Energy Performance Contract Flexibility Data

See Initiative 7: DCHA Subsidiary to Act as Energy Services Company

Appendix A: Local Asset Management Program

Background and Introduction

The Amended and Restated Moving to Work Agreement, effective September 29, 2010, required DCHA to design and implement a local asset management program for its Public Housing Program and describe such program in its Annual MTW Plan. The term “Public Housing Program” means the operation of properties owned or subsidized by the Agency that are required by the U.S. Housing Act of 1937 to be subject to a Public Housing declaration of trust in favor of HUD. The Agency’s local asset management program shall include a description of how it’s implementing project-based property management, budgeting, accounting, and financial management and any deviations from HUD’s asset management requirements. Under the First Amendment to the MTW Agreement, DCHA agreed to describe its cost accounting plan (cost allocation plan) as part of its local asset management program including how it deviates from the HUD fee for service system.

Project-based approach for Public Housing Program

DCHA maintains a project-based management approach which includes both DCHA-managed properties, as well as privately managed properties, under the Public Housing Program. Project-level budgeting and accounting is maintained for each of these Public Housing properties. In addition, each mixed-income, mixed-finance rental community that contains Agency-assisted units under the Public Housing Program are owned, managed and operated by third party partnerships as established at the time each of the transactions were structured. DCHA maintains a separate budget and accounting for the operating subsidy paid to the owners of these properties as well as any other cost incurred by the Agency on behalf of these properties.

COST ALLOCATION PLAN

Identification of Cost Allocation Approach

DCHA approached its cost allocation plan with consideration to the entire operation of the Agency, rather than a strict focus on only the MTW Program. This cost allocation plan addresses the larger DCHA operation as well as the specific information required related to the MTW Program.

Under the MTW Agreement, the cost accounting options available to the Agency include either a “fee-for-service” methodology or an “indirect cost rate” methodology. DCHA can establish multiple cost objectives or a single cost objective for its MTW Program. DCHA opted to use a fee-for-service methodology and to establish the MTW Program as a single cost objective, as further described below.

Classification of Costs

There is no universal rule for classifying certain costs as either direct or indirect. 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, the definitions and guidelines provided in this Cost Allocation Plan are used for determining direct and indirect costs charged to the cost objectives.

Definitions

Cost Objective – Cost objective is a function, organizational subdivision, contract, grant, or other activity for which cost data are needed and for which costs are incurred.

Direct Costs – Direct costs are those that can be identified specifically with a particular final cost objective.

Indirect Costs – Indirect costs are those: (a) incurred for a common or joint purpose benefitting more than one cost objective, and (b) not readily assignable to the cost objective(s) specifically benefitted, without effort disproportionate to the results achieved. After direct costs have been determined and assigned directly to Federal awards and other activities as appropriate, indirect costs are those remaining to be allocated to the cost objectives.

Cost Base – A cost base is the accumulated direct costs (normally either total direct salaries and wages or total direct costs exclusive of any extraordinary or distorting expenditures) used to distribute indirect costs to cost objectives (Federal awards). Generally, the direct cost base selected should result in each award bearing a fair share of the indirect costs in reasonable relation to the benefits received from the costs.

DCHA Cost Objectives

DCHA has identified the following cost objectives:

MTW Program – All associated activities funded under the MTW Single Fund authority are deemed as a **single cost objective**. The MTW Program cost objective includes: 1) DCHA-owned Public Housing Properties and Public Housing units contained in third party-owned properties, 2) MTW Housing Choice Vouchers, both Project-Based Vouchers (PBV) and Tenant-Based Vouchers, 3) Development Activity funded from MTW, 4) resident services and case management services offered to families served under the MTW program, 5) Capital Funds, and 6) any other activity that is permitted in DCHA's Amended and Restated MTW Agreement.

Revitalization Program – The Revitalization Program includes the development-related activity funded from HOPE VI, Choice Neighborhood Initiatives and other local funds. Generally, DCHA will capture costs by development and will include the ability to track charges to specific funding sources.

Special Purpose (Non-MTW) Tenant-Based and Project-Based Housing Choice Vouchers – Special Purpose Vouchers include, but are not limited to, the Section 8 Moderate Rehab Program, the Veterans Affairs Supportive Housing (VASH) vouchers, Tenant Protection and Opt-Out Vouchers in the first year, and the Multicultural vouchers.

Other Federal and State Awards – DCHA may be the recipient of other Federal and Local awards from time to time. Each of these awards will be a separate cost objective as necessary. For example, DCHA has two locally funded voucher programs that are treated as separate programs and therefore, as separate cost objectives.

DCHA Direct Costs

DCHA direct costs are defined in conjunction with the cost objectives defined in this Cost Allocation Plan. As previously mentioned, under OMB Circular A-87, there is no universal rule for classifying costs as either direct or indirect. A cost may be direct with respect to some specific service or function, but indirect with respect to the final cost objective.

MTW Program direct costs include, but are not limited to:

1. All contract costs readily identifiable with delivering housing assistance to low-income families under the MTW Program;

2. Housing Assistance Payments (including utility allowances) for tenant-based vouchers and PBV;
3. Portability Administrative Fees;
4. Homeownership voucher funding;
5. Foreclosure and emergency assistance for low-income families served under HCV;
6. HCV costs for administering tenant-based vouchers, including inspection activities;
7. Operating costs directly attributable to operating DCHA-owned Public Housing properties, including utility costs and maintenance costs administered centrally;
8. Capital improvement costs at DCHA owned properties;
9. Operating subsidies paid to MIMF properties
10. Operating costs paid related to or on behalf of third party owned properties with Public Housing units including utility charges;
11. The Asset Management Department costs attributable to PBV, DCHA-owned Public Housing properties and third party-owned Public Housing units;
12. Resident Services directly attributable to MTW Program activities;
13. Gap financing in MTW real estate transactions;
14. Acquisition costs funded from MTW funds
15. Demolition, relocation and leasing incentive fees in repositioning DCHA-owned real estate;
16. Homeownership activities for low-income families;
17. Office of Capital Programs and Development costs associated with MTW-funded development activity, homeownership initiatives, and PBRA as a development tool, and
18. Any other activities associated with delivering housing assistance to low-income families under the MTW Program.

Revitalization Program direct costs include, but are not limited to:

1. Construction costs;
2. Loan and financing for affordable units;
3. Acquisition costs;
4. Land Improvements;
5. Legal expenses;
6. Professional services;
7. Contract cost (case management);
8. Relocation;
9. Extraordinary site work;
10. Demolition; and
11. Other revitalization expenditures (such as homeownership mortgage assistance and down payment assistance).

Special Purpose Housing Choice Tenant-based Vouchers direct costs include, but are not limited to:

1. Housing Assistance Payments (HAP) and
2. Program Administration Costs.

Other Federal and State Awards direct cost include, but are not limited to:

1. Legal expenses;
1. Professional services;

2. Utilities (gas, water, electric, other utilities expense);
3. Real estate taxes;
4. Insurance;
5. Bank charges;
6. Staff training;
7. Interest expense;
8. Contract cost for CDBG; and
9. Any cost identified for which the award is made. Such costs will be determined as DCHA receives awards.

Explanation of Differences

DCHA has the ability to define direct costs differently than the standard definitions published in HUD's Financial Management Guidebook pertaining to the implementation of 24 CFR Part 990.

DCHA is required to describe any differences between the Agency's Local Asset Management Program and HUD's asset management requirements in its Annual MTW Plan in order to facilitate the recording of actual property costs and submission of such cost information to HUD:

1. DCHA determined to implement a cost allocation system that was more comprehensive than HUD's Asset Management System which advocated a fee-for-service approach specific to the properties in the Public Housing Program. HUD's system was limited in focusing only a fee-for-service system at the property level and failed to address DCHA's comprehensive operation which includes other programs and business activities. DCHA's MTW Program is much broader than Public Housing properties and includes activities not found in traditional HUD Programs. This Cost Allocation Plan addressed the entire DCHA operation.
2. DCHA defined its cost objectives at a different level than HUD's System. Specifically, DCHA defined the MTW Program as a cost objective which is consistent with the issuance of the CFDA number for MTW as a Federal program. HUD defined its cost objective at the property level which fails to recognize the overall effort required to deliver the housing resources to low-income families under the MTW Program. Because the cost objectives are defined differently, direct and indirect costs are defined based on the cost objectives identified in this Cost Allocation Plan.
3. DCHA will use a simple fee system of charging 10% of MTW Program funds to cover the costs of the Central Office Cost Center (COCC). DCHA views the 10% fee as reasonable when compared to the fees earned for administering the Local Voucher Programs. DCHA will account for an allocable share of the "MTW Fee" charges at the property level based upon the size of the property.
4. DCHA will charge a fee to other Federal and Local awards in a manner that is consistent with that allowed for those Federal awards. The fee charged to the Revitalization program will continue to follow the HUD guidelines of 3% of the total cost of the development.



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