



SAN DIEGO
HOUSING
COMMISSION

Moving Forward Moving To Work Program Annual Plan for Fiscal Year 2024

San Diego Housing Commission
Rental Assistance Division
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SECTION I – INTRODUCTION AND AGENCY GOALS

MESSAGE FROM THE PRESIDENT & CEO

Families with low income or experiencing homelessness in the City of San Diego are at the heart of the work the San Diego Housing Commission (SDHC) performs every day.

SDHC's status as a "Moving to Work" (MTW) agency is essential to our ongoing efforts to provide housing assistance to these families, who need it most in the competitive, high-cost San Diego rental housing market.

With MTW flexibility, we have implemented a variety of initiatives to address housing challenges in the City of San Diego. These initiatives also reflect MTW's statutory objectives: use federal dollars more efficiently; help residents to become more financially self-reliant; and improve housing choices for families with low income.

For example, we created the SDHC Achievement Academy, a learning and resource center with programs that emphasize career planning, job skills, job placement and personal financial education, such as budgeting. With the SDHC Achievement Academy in place, our Path to Success initiative modified the method SDHC uses to determine the portion of the monthly rent that rental assistance participants and public housing residents pay; it also encourages more financial self-reliance.

Many programs of HOUSING FIRST – SAN DIEGO, SDHC's homelessness action plan, also are MTW initiatives. One of these programs, Moving Home rapid rehousing, helps individuals and families experiencing homelessness to obtain and maintain permanent housing through a tailored package of assistance that can include rental assistance and case management. Our Landlord Engagement and Assistance Program (LEAP), another MTW initiative, provides incentives and support for landlords who rent to people who experienced homelessness. LEAP assists other HOUSING FIRST – SAN DIEGO programs, including Moving Home.

For Fiscal Year (FY) 2024 (July 1, 2023 – June 30, 2024), SDHC once again proposes to use MTW flexibility to enhance and create efficiencies in our programs. As rents in the San Diego region continue to increase it is a core focus of SDHC to identify opportunities to achieve fiscal efficiencies so our voucher Payment Standards can remain competitive and our families can continue to have access to quality housing across all areas of the City. This MTW Annual Plan includes details of previous initiatives, as well as our proposals for FY 2024 to update the Path to Success initiative with changes to medical allowances, and utility allowances to create efficiencies and an update to the household age designation to align with the Department of Housing and Urban Development current definition of elderly. SDHC is also proposing updates to the Moving Home initiative to expand program eligibility to potentially reach more households in need.

SDHC's motto is, "We're About People." One of our core values as an agency is to serve our clients with equity, dignity and respect.

MTW flexibility allows SDHC to innovate housing solutions for families with low income or experiencing homelessness and build upon our existing initiatives.

As we collaborate with elected leaders, developers, landlords, service providers and a variety of organizations throughout the community, we look forward to the positive impact our MTW initiatives will continue to have in the year ahead.

Sincerely,

Jeff Davis
Interim President and Chief Executive Officer
San Diego Housing Commission







SHORT-TERM AND LONG-TERM MTW GOALS

LONG-TERM GOALS

SDHC STRATEGIC PLAN

The San Diego Housing Commission's (SDHC) [Strategic Plan](#) provides the vision, mission, purpose, core values and strategic priorities that guide SDHC's decisions, initiatives and day-to-day efforts.

The five Strategic Priority Areas identified in the Strategic Plan are:

1. Increasing and Preserving Housing Solutions.
2. Helping Families Increase Opportunities for Self-Sufficiency and Quality of Life
3. Investing in Our Team
4. Advancing Homelessness Solutions – Supporting the City of San Diego Community Action Plan on Homelessness
5. Advocacy, Communication, Public Engagement

COMMUNITY ACTION PLAN ON HOMELESSNESS FOR THE CITY OF SAN DIEGO

City of San Diego Community Action Plan on Homelessness

The [Community Action Plan on Homelessness](#) for the City of San Diego (Community Action Plan) established short-term achievable goals and serves as a guide for long-term success in addressing homelessness. SDHC was one of the lead agencies in the creation of the Community Action Plan, a comprehensive, 10-year plan that the San Diego City Council accepted in October 2019.

The Community Action Plan identified five foundational strategies and a set of principles that guide the work toward meeting the plan's goals. The Five Foundational Strategies are:

- 1. Implement a Systems Level Approach to Homelessness Planning**
Plans are collaborative and leverage city, SDHC, county and regional resources to strengthen programming and ensure the implementation of programs that bridge system gaps.
- 2. Create a Client-Centered Homeless Assistance System**
This involves creating a system that centers around clients and values client input in everything from day-to-day operations to program and policy development.
- 3. Decrease Inflow Through Increase of Prevention and Diversion**
This strategy encourages working with other regional systems to prevent homelessness when possible and divert people at risk of experiencing homelessness from the system altogether.
- 4. Improve the Performance of the Existing System**
Actions include reviewing current practices, performance and metrics to facilitate a move from project- or program-level thinking to system-level thinking.
- 5. Increase the Production of and Access to Permanent Solutions**
This includes identifying low-income and affordable housing options to increase opportunities and provide greater access to permanent housing.

A citywide Leadership Council reviews progress on the action plan and provides direction. The plan also created an Implementation Team of senior staff and a project manager position to keep progress on track. SDHC Interim President & CEO Jeff Davis serves on the Leadership Council. SDHC Executive Vice President of Strategic Initiatives Lisa Jones serves on the Implementation Team. SDHC's Project Manager for the Community Action Plan, Nancy Sa, also serves on the Implementation Team. Policy Liaisons for the Community Action Plan include SDHC Senior Vice President of Policy and Land Use Molly Chase.

In Fiscal Year 2024, the Implementation Team will continue to focus on implementing underlying action items that support the five foundational strategies and work toward meeting the Action Plan goals, including:

- **Develop and Maintain a Coordinated Funding Strategy for Homelessness Services**
At its October 2022 meeting, the Leadership Council received updates on funding priorities and strategies for homelessness services for Fiscal Year 2024 from the County of San Diego Department of Homeless Solutions and Equitable Communities (HSEC), the City of San Diego Homelessness Strategies and Solutions Department (HSSD), SDHC and the Regional Task Force on Homelessness (RTFH). The Leadership Council encouraged the ongoing coordination for upcoming funding opportunities, including a resource mapping effort that would align with an RTFH-led effort to convene a funding strategy



meeting with the principal funding agencies. Through a contract with SDHC, the Corporation for Supportive Housing (CSH), the consultant that helped draft the Community Action Plan, is working with the Implementation Team to conduct an updated review of the crisis response and housing needs in the Community Action Plan.

- **Promote Equity Through Review of Data, Policies, and Practices**

The Regional Task Force on Homelessness (the regions Continuum of Care) Ad Hoc Committee on Addressing Homelessness Among Black San Diegans (Ad Hoc Committee), which explores the factors contributing to disparities among people who are black experiencing homelessness, has developed a series of recommendations to better address the impacts of systemic racism and its effects within the homeless crisis response system.

SHORT-TERM GOALS

EQUITY REVIEW

SDHC's Strategic Plan reflects the agency's commitment to equity and inclusivity. SDHC embraces diverse approaches and points of view to improve its programs, projects and policies. SDHC believes in delivering programs and services in innovative and inclusive ways. SDHC is committed to advancing equity and inclusion both internally and externally.

SDHC continues the process of reviewing the design and implementation of its policies to analyze the impact they may have on underserved and marginalized individuals and groups.

These groups include: race and ethnicity, religious expression, veteran status, nationality (including underrepresented groups and new immigrant populations), people who identify as women, age, socio-economic background, people with apparent or non-apparent disabilities, people of various gender and sexual identities and expressions, American Indians and additional indigenous populations.

This policy review process will provide a structure for institutionalizing the consideration of equity in the process of making, implementing and assessing policy.

SDHC has already reviewed its administrative regulations through this process and plans to review all of the agency's existing and future policies through an equity lens.

DIGITAL INCLUSION

Through its Digital Inclusion Project, which launched in February 2021, SDHC continues to identify opportunities to bridge the "digital divide" between households with access to technology and the internet and those who do not have access.

This "digital divide" adversely affects households with low income and reflects inequities in the abilities of these households to access the internet.

SDHC hosts in-person events at affordable rental housing properties that SDHC owns and/or manages. In collaboration with a variety of providers, these resource events distribute information about digital equity programs and resources available to low-income families, such as no- or low-cost broadband internet service.

SDHC has also entered into a new partnership with the [San Diego Futures Foundation](#) in support of the agency's Digital Equity and Inclusion efforts. SDHC donates retired computers, laptops and tablet devices. Through this partnership, 60 percent of the equipment SDHC donates will be made available at no cost to SDHC clients and the residents of public housing that SDHC operates.

SDHC also has a pilot program in partnership with [San Diego Oasis](#), through which approximately 70 seniors were provided with tablets, broadband access and training.

WORKFORCE DEVELOPMENT: SDHC ACHIEVEMENT ACADEMY

The SDHC Achievement Academy is a learning and resource center with programs that emphasize career planning, job skills, job placement and personal financial education, such as budgeting. Programs are available at no cost to eligible participants. Households with low income in the City of San Diego are eligible to participate in these programs. Many motivated clients have successfully secured employment, increased their earnings or started their own businesses. SDHC's Strategic Plan includes objectives to increase awareness

SECTION I – INTRODUCTION AND AGENCY GOALS



of and participation in SDHC Achievement Academy programs and to establish new partnerships to supplement SDHC Achievement Academy programs by the end of Fiscal Year 2024.

For more information: www.sdhc.org/achievement-academy

WORKFORCE DEVELOPMENT: HOMELESS PROGRAM FOR ENGAGED EDUCATIONAL RESOURCES (PEER)

A first-of-its kind collaboration between SDHC and San Diego City College, the Homelessness PEER course provides specialized education, training and job placement assistance to develop the workforce needed for programs and services that help San Diegans experiencing homelessness. SDHC identified the need for additional qualified applicants for positions in the area of homelessness programs and services. SDHC and the City of San Diego fund Homelessness PEER, while San Diego City College leverages existing San Diego Community College District resources. This program is part of SDHC's ongoing efforts to address workforce and capacity challenges in the homelessness services sector in the City of San Diego.

For more information: www.sdhc.org/homelessness-solutions/peer

HOMEKEY FUNDING: PATH VILLAS EL CERRITO PHASE 1 DEVELOPMENT

On August 24, 2022, the State of California announced its award of \$11.825 million in Homekey program funds for the collaborative development of PATH Villas El Cerrito Phase 1. The development was one of 35 throughout the state that were awarded Project Homekey funds, totaling \$694 million and creating 2,500 new units in 19 communities.

SDHC submitted an application for PATH Villas El Cerrito Phase 1 in collaboration with the County of San Diego and People Assisting the Homeless (PATH) Ventures. The development team includes PATH, PATH Ventures, Family Health Centers of San Diego, and Bold Communities.

The development will create 40 affordable rental apartments for individuals, families and veterans who previously experienced homelessness and one unrestricted manager's unit. The development will be built with prefabricated, container-based housing and will include a ground-floor health clinic operated by Family Health Centers of San Diego.

SDHC committed 40 Project-Based Housing Vouchers to help residents pay their rent, of which five are Veterans Affairs Supportive Housing (VASH) vouchers. Residents would be identified through referrals from San Diego's Coordinated Entry System.

Created during the COVID-19 pandemic, Homekey is a state effort to help "sustain and rapidly expand housing for persons experiencing homelessness or at risk of homelessness, who are especially impacted by COVID-19 and other communicable diseases."

EXPLORING INCREASING DENSITY AT SDHC AFFORDABLE HOUSING PROPERTIES

On October 3, 2022, the San Diego City Council and County of San Diego Board of Supervisors met in a special joint session for a Housing Summit.

They approved a resolution expressing their intent to take joint action to increase the availability of affordable homes in the San Diego region, including efforts to build 10,000 affordable homes on government-owned land and increasing the density of affordable rental properties owned or managed by SDHC and its nonprofit affiliate, Housing Development Partners.

SDHC presented a proposed concept for potentially greater density at its affordable housing properties during the joint City-County meeting. SDHC will work with a land use consultant to evaluate several factors to determine whether additional density is feasible and, if so, at which properties.

SDHC COLLABORATIVE AFFORDABLE HOUSING DEVELOPMENTS

Furthering the goal of increasing and preserving affordable housing, the following SDHC collaborative developments are among approximately 2,628 affordable rental housing units that have received at least preliminary approval from the SDHC Board of Commissioners and are pending completion:

- **Jamboree San Ysidro** (rehabilitation) – 64 permanent supportive housing units for San Diegans with mental disabilities experiencing homelessness
- **Scripps Mesa** (new construction, mixed income) – 53 affordable units for families with low income



- **Courthouse Commons** (new construction, mixed-income) – 41 affordable units for families with low income
- **Ulric Street** (new construction) – 95 affordable units for families with low income
- **Grant Heights II** (rehabilitation, scattered sites) – 41 affordable units for families with low income (formerly Grant Heights and Winona properties)
- **Mercado** (rehabilitation) – 142 affordable units for families with low income
- **The Orchard** (new construction) – 111 affordable units for families with low income (formerly Hilltop & Euclid Family Housing)
- **Ventana al Sur** (new construction) – 100 affordable rental housing units for seniors with low income or experiencing homelessness
- **13th & Broadway** (new construction) – 270 affordable units for individuals and veterans experiencing homelessness and individuals with very low income
- **The Helm** (new construction) – 77 affordable units for families with low income (formerly Front & Beech)
- **Ulric Street Apartments II** (new construction) – 59 affordable units for seniors with low income
- **The Junipers** (new construction) – 80 affordable rental housing units for seniors with low income
- **Tranquility at the Post 310** (new construction, mixed income) – 42 housing units for veterans with low income or experiencing homelessness
- **Aquila Apartments** (new construction) – 180 affordable units for individuals and families with low-income (formerly 3Roots)
- **Bandar Salaam** (rehabilitation) – 67 affordable units for families with low income
- **ShoreLINE** (new construction) – 153 affordable units for families with low income
- **The Iris** (new construction, mixed income) – 99 affordable units for families with low income
- **Nestor Senior Village** (new construction) – 73 affordable rental housing units for seniors experiencing homelessness
- **Levant Senior Cottages** (new construction) – 126 affordable units for low-income seniors
- **Cortez Hill Apartments** (new construction) – 87 affordable units for families with low income, of which 14 units are for families experiencing homelessness
- **Merge 56** (new construction) – 47 affordable units for families with low income
- **Messina Senior Apartments** – (new construction) – 78 affordable units for seniors with low income
- **Navajo Family Apartments** – (new construction) 44 affordable units for families with low income
- **Iris Trolley Apartments** – 63 affordable units for families with low income
- **Tizon Apartments** (acquisition and rehabilitation) – 175 affordable units for seniors with low income (formerly Radisson Hotel Conversion)
- **Rancho Bernardo Transit Village** (new construction) – 99 affordable units for families with low income



SECTION II – GENERAL OPERATING INFORMATION

A. HOUSING STOCK INFORMATION MATRIX

I. PLANNED NEW PUBLIC HOUSING UNITS

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

ASSET MANAGEMENT PROJECT (AMP) NAME AND NUMBER	BEDROOM SIZE						TOTAL UNITS	POPULATION TYPE*	# OF UFAS UNITS	
	0/0	2	3	4	5	6+			FULLY ACCESSIBLE	ADAPTABLE
N/A	0	0	0	0	0	0	0	N/A	0	0

TOTAL PUBLIC HOUSING UNITS TO BE ADDED 0

* Select "Population Type" from: Elderly, Disabled, General, Elderly/Disabled, Other

If "Population Type" is "Other" please describe:

N/A

II. PLANNED PUBLIC HOUSING UNITS TO BE REMOVED

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

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

0 TOTAL PUBLIC HOUSING UNITS TO BE REMOVED IN THE PLAN YEAR



A. HOUSING STOCK INFORMATION MATRIX

III. PLANNED NEW PROJECT-BASED VOUCHERS

Tenant-based vouchers that the MTW PHA anticipates project-basing for the first time during the Plan Year. These include only those in which at least an AHAP will be in place by the end of the Plan Year.

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	RAD	DESCRIPTION OF PROJECT
CUATRO AT CITY HEIGHTS	48	N/A	LOW INCOME
IRIS AT SAN YSIDRO	25	N/A	LOW INCOME
MT. ETNA SENIOR-PHASE I	8	N/A	LOW INCOME SENIORS
RANCHO BERNARDO TRANSIT VILLAGE	30	N/A	LOW INCOME
BEYER BOULEVARD TROLLEY	30	N/A	LOW INCOME
13TH AND BROADWAY 4%	65	N/A	LOW INCOME AND HOMELESS
13TH AND BROADWAY 4%	40	N/A	HOMELESS
EL CERRITO (HOME KEY)	35	N/A	HOMELESS

281

PLANNED TOTAL VOUCHERS TO BE NEWLY PROJECT-BASED

A. HOUSING STOCK INFORMATION MATRIX (CONT.)

IV. PLANNED EXISTING PROJECT-BASED VOUCHERS

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP is already in place at the beginning of the Plan Year.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
TAKE WING	8	LEASED/ISSUED	N/A	HOMELESS
HOLLYWOOD PALMS	23	LEASED/ISSUED	N/A	LOW-INCOME
LEAH RESIDENCE	14	LEASED/ISSUED	N/A	HOMELESS
TOWNSPEOPLE	9	LEASED/ISSUED	N/A	HOMELESS
POTIKER	36	LEASED/ISSUED	N/A	LOW-INCOME
ALABAMA MANOR	14	LEASED/ISSUED	N/A	LOW-INCOME
MEADE	10	LEASED/ISSUED	N/A	LOW-INCOME
SANTA MARGARITA	12	LEASED/ISSUED	N/A	LOW-INCOME
THE COURTYARD	3	LEASED/ISSUED	N/A	LOW-INCOME
HOTEL SANDFORD	27	LEASED/ISSUED	N/A	LOW-INCOME
CONNECTIONS HOUSING	73	LEASED/ISSUED	N/A	HOMELESS
MASON HOTEL	16	LEASED/ISSUED	N/A	HOMELESS
PARKER-KIER	22	LEASED/ISSUED	N/A	HOMELESS
CELADON	88	LEASED/ISSUED	N/A	HOMELESS
ALPHA SQUARE	76	LEASED/ISSUED	N/A	HOMELESS
NEW PALACE HOTEL	79	LEASED/ISSUED	N/A	HOMELESS
VILLAGE NORTH SENIOR	44	LEASED/ISSUED	N/A	HOMELESS
ATMOSPHERE	51	LEASED/ISSUED	N/A	HOMELESS
TALMADGE GATEWAY	59	LEASED/ISSUED	N/A	HOMELESS
CYPRESS APARTMENTS	62	LEASED/ISSUED	N/A	HOMELESS
NORTH PARK SENIOR	8	LEASED/ISSUED	N/A	HOMELESS
QUALITY INN	91	LEASED/ISSUED	N/A	HOMELESS
WEST PARK	46	LEASED/ISSUED	N/A	HOMELESS
ALPHA LOFTS	52	LEASED/ISSUED	N/A	HOMELESS
ZEPHYR	84	LEASED/ISSUED	N/A	HOMELESS
VISTA DEL PUENTE	38	LEASED/ISSUED	N/A	HOMELESS
THE BEACON	43	LEASED/ISSUED	N/A	HOMELESS
STELLA	62	LEASED/ISSUED	N/A	HOMELESS
THE LINK	72	LEASED/ISSUED	N/A	HOMELESS
SAN YSIDRO SENIOR	50	LEASED/ISSUED	N/A	HOMELESS
BENSON PLACE	82	LEASED/ISSUED	N/A	HOMELESS
IVY APARTMENTS	52	LEASED/ISSUED	N/A	HOMELESS
TRINITY PLACE	73	LEASED/ISSUED	N/A	HOMELESS

SECTION II – GENERAL OPERATING INFORMATION



14TH & COMMERCIAL	254	LEASED/ISSUED	N/A	HOMELESS
THE HELM (FRONT AND BEECH)	32	LEASED/ISSUED	N/A	HOMELESS
THE ORCHARD AT HILLTOP	25	LEASED/ISSUED	N/A	LOW-INCOME
JAMBOREE-SAN YSIDRO	64	LEASED/ISSUED	N/A	LOW-INCOME
VALLEY VISTA	190	LEASED/ISSUED	N/A	HOMELESS
KEARNY VISTA	142	LEASED/ISSUED	N/A	HOMELESS
HILLCREST INN	12	LEASED/ISSUED	N/A	HOMELESS
SHORELINE (GRANTVILLE)	25	LEASED/ISSUED	N/A	LOW-INCOME
TIZON	44	LEASED/ISSUED	N/A	LOW-INCOME
NESTOR SENIOR VILLAGE	73	LEASED/ISSUED	N/A	LOW-INCOME
ULRIC II	59	LEASED/ISSUED	N/A	LOW-INCOME
LEVANT SENIOR COTTAGES	70	LEASED/ISSUED	N/A	LOW-INCOME
HACIENDA TOWNHOMES	19	LEASED/ISSUED	N/A	LOW-INCOME
SORRENTO TOWER	17	LEASED/ISSUED	N/A	LOW-INCOME
ADU PILOT	5	LEASED/ISSUED	N/A	LOW-INCOME
TRANQUILITY AT THE POST 310	10	LEASED/ISSUED	N/A	HOMELESS
VENTANA AL SUR	25	LEASED/ISSUED	N/A	HOMELESS
SOUTHWEST VILLAGE	50	LEASED/ISSUED	N/A	LOW-INCOME AND HOMELESS
CORTEZ HILL APARTMENTS	87	LEASED/ISSUED	N/A	LOW-INCOME AND HOMELESS
NAVAJO FAMILY APARTMENTS	8	LEASED/ISSUED	N/A	

2,690

PLANNED TOTAL EXISTING PROJECT-BASED VOUCHERS

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



A. HOUSING STOCK INFORMATION MATRIX

V. PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED IN THE PLAN YEAR

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

No changes anticipated.

VI. GENERAL DESCRIPTION OF ALL PLANNED CAPITAL EXPENDITURES DURING THE PLAN YEAR

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

SDHC anticipates Capital Fund Program formula funds will be used to fund the soft costs, the hard costs and administrative costs of various renovation activities throughout the (8) Public Housing properties consisting of (189) public housing units. Hard costs may include upgrades to property fencing, parking lot seal and stripe, security camera and safety improvements, limited stair upgrades, exterior area and building lighting, limited electrical, and limited site improvements. Soft costs may include architecture and engineering and third-party consultants for due diligence related activities. The property and scope selection are to be determined.



B. LEASING INFORMATION MATRIX

I. PLANNED NUMBER OF HOUSEHOLDS SERVED

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

PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH:	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED**
MTW Public Housing Units Leased	2,268	189
MTW Housing Choice Vouchers Utilized	171,204	14,267
Local, Non-Traditional: Tenant-Based^	14,316	1,193
Local, Non-Traditional: Property-Based^	13,056	1,088
Local, Non-Traditional: Homeownership^	240	20
PLANNED TOTAL HOUSEHOLDS SERVED	201,084	16,757

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

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

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

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED*
Tenant-Based	Sponsor-Based Subsidy Program / 2011-8	10,992	916
Tenant-Based	Transitional Project-Based Subsidy Program / 2013-6	564	47
Tenant-Based	Monarch Housing Program / 2016-1	300	25
Tenant-Based	Guardian Scholars Program / 2016-2	1,080	90
Tenant-Based	Moving On Program / 2017-1	480	40
Tenant-Based	Moving Home Program / 2018-1	900	75
Property-Based	Affordable Housing Development / 2011-4	12,444	1,037
Property-Based	Preservation of Affordable Housing in the City of San Diego / 2021-2	612	51
Homeownership	Homeownership Program / 2022-1	240	20
PLANNED/ACTUAL TOTALS		27,612	2,301

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

II. DISCUSSION OF ANY ANTICIPATED ISSUES / POSSIBLE SOLUTIONS RELATED TO LEASING

Discussion of any anticipated issues and solutions utilized in the MTW housing program listed.

HOUSING PROGRAM	DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS
MTW Public Housing	N/A
MTW Housing Choice Voucher	N/A
Local, Non-Traditional	N/A



C. WAITING LIST INFORMATION MATRIX

I. WAITING LIST INFORMATION ANTICIPATED

Snapshot information of waiting list data as anticipated at the beginning of the Plan Year. The "Description" column should detail the structure of the waiting list and the population(s) served.

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN, OR CLOSED
Housing Choice Voucher: Tenant-Based	Community Wide	134,377	Open
Housing Choice Voucher: Project-Based	Site-Based	75,193	Open
Housing Choice Voucher: Project-Based (Single)	Site-Based	17	Closed
Public Housing	Community Wide	103,901	Open
Local Non-Traditional	Community Wide	N/A	N/A

Please describe any duplication of applicants across waiting lists:

Applicants have the opportunity to apply to multiple rental assistance programs and often appear on multiple wait lists. Local Non-Traditional programs utilized the Coordinated Entry System (CES) for waitlist purposes.

II. PLANNED CHANGES TO WAITING LIST IN THE PLAN YEAR

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

WAITING LIST NAME	DESCRIPTION OF PLANNED CHANGES TO WAITING LIST
Housing Choice Voucher: Tenant-Based	Anticipate waitlist number to decrease due to refresh occurring in FY 2023.
Housing Choice Voucher: Project-Based	Anticipate waitlist number to decrease due to refresh occurring in FY 2023.
Housing Choice Voucher: Project-Based (Single)	Anticipate waitlist number to decrease due to refresh occurring in FY 2023.
Public Housing	Anticipate waitlist number to decrease due to refresh occurring in FY 2023.
Local Non-Traditional	None



SECTION III – PROPOSED MTW ACTIVITIES: HUD APPROVAL REQUESTED

2012-1. PATH TO SUCCESS (RE-PROPOSED)

Activity Description

Path to Success is a comprehensive rent reform measure designed to motivate and benefit Work-Able rental assistance participants while remaining impact neutral to Elderly/Disabled households. The Tiered Rent Table component of the activity both incentivizes and rewards Work-Able households for increasing income by using the lower edge of an annual income range when calculating the rent portion instead of actual income. The activity also institutes progressive minimum rents for Work-Able households, thus requiring certain households to increase annual income amounts to meet the applicable minimum rent threshold. Path to Success was initially proposed in the Fiscal Year 2012 MTW Annual Plan, re-proposed in the Fiscal year 2012 MTW Annual Plan to restructure the rent reform model, re-proposed again in the Fiscal Year 2014 MTW Annual Plan to include a local portability policy, and re-proposed again in the Fiscal Year 2019 MTW Annual Plan to adjust the minimum rents used for Work-Able rent calculations.

This re-proposal of the initiative in Fiscal Year 2024 modifies the rent reform model further by adjusting household age designation, utility reimbursement payments, and medical allowances. All other facets of the initiative remain constant.

Elderly/Disabled Rent Reform Model

As part of Path to Success, the Elderly/Disabled population includes families where 100 percent of adults are either 55 years of age, disabled, or a full-time student ages 18 to 23. SDHC proposes that this definition be revised to include Elderly/Disabled population families where 100 percent of adults are either 62 years of age, disabled, or a full-time student ages 18 to 23. This will align with HUD's defined age of an elderly person.

In a national report by the U.S. Bureau of Labor Statistics, there has been a 22 percent increase between 2012 and 2022 in employment for individuals 55 years and over. An increasing number of households who are 55 years of age or older are still Work-Able, and this modification to the definition of elderly household to align with the current HUD definition, will encourage continued employment for those households.

Utility Allowance

SDHC proposes to eliminate utility reimbursement payments and the utility allowance schedule requirement and remove the requirement to collect, analyze, and report information on utility responsibilities in order to achieve greater cost effectiveness, administrative efficiencies, and flexibility to improve housing choice in Federal expenditures. The removal of utility reimbursement payments will simplify the HAP and tenant rent calculation. In addition, utility reimbursements are difficult to explain to property owners and clients, and often result in frustration when the methodology is misunderstood, which may limit housing choice options. A hardship policy will be developed for households who experience a hardship due to the implementation of this change.

Medical Allowance

SDHC proposes to revise how adjusted income is determined by eliminating medical allowances as an allowable deduction from adjusted income in order to achieve greater cost effectiveness and administrative efficiencies in Federal expenditures. As of November 2022, only 1% of all PTS households are receiving a medical deduction. Of the total number of households who submitted a request for a medical allowance, 84% did not meet the eligibility criteria, which demonstrates an administrative burden. Households who are currently receiving a medical allowance will continue to receive the same allowance for as long as they remain eligible for it, to prevent additional hardship. A hardship policy will also be created for households with medical expenses over \$10,000.



Total PTS Households	Number Requesting Allowance	Number Receiving Allowance	Percent of PTS HH's Receiving Allowance
13027	802	129	1%
Households Who Requested for Medical Allowance			
Bands	Allowance	Percent of Households	Number of Households
Band 1 \$1-2499	\$0	5.17%	673
Band 2 \$2500-4999	\$2500	0.64%	83
Band 3 \$5000-7499	\$5000	0.18%	23
Band 4 \$7500-9999	\$7500	0.07%	9
Actual (over \$10K)	Actual	0.11%	14
Households with Medical Allowance:		16%	129

Statutory Objectives

The activity will achieve the statutory objective to reduce cost and achieve greater cost effectiveness in Federal expenditures and encourage self-sufficiency of Work-Able households.

Anticipated Impacts

Path to Success was designed to accomplish two primary goals: Encourage self-sufficiency of Work-Able households as well as utilize Federal expenditures more efficiently and effectively in an effort to serve more San Diegans. SDHC is proposing the revisions to the activity in order to utilize Federal expenditures more efficiently, which will be achieved by reducing administrative burden caused by reviewing medical allowance requests, eliminating utility reimbursement payments and removing the requirement to collect information on utility responsibility. This repropoed activity will also encourage self-sufficiency of Work-Able households by aligning the age for elderly households with HUD's defined age of an elderly person.

SDHC anticipates long-term cost savings related to the measures contained in the proposed Path to Success model. The long-term cost savings cannot be definitively predicted due to fluctuations in household income, changes in payment standard amounts, inflation, and HUD funding levels and all factors associated with agency funding. However, SDHC projection modeling identified a decrease in Housing Assistance Payments (HAP) in the first two years of implementation when not taking into account other factors that impact monthly HAP costs including fluctuations in housing income, increases in payment standards, inflation, and HUD funding levels.

Anticipated Timeline to Achieve Objectives

The proposed revisions to Path to Success are scheduled to begin on July 1, 2023. The revision of the definition of elderly households will begin for all existing and new households beginning July 1, 2023. Households who are already receiving a medical allowance will continue to receive the allowance, and all other households will be subject to the revised policy beginning July 1, 2023. SDHC will incorporate the removal of the requirement to keep record of utility responsibility with its existing recertification schedule beginning July 1, 2023. The removal of the collection of the utility information will begin effective July, 1 2023 which includes but is not limited to a revision to the Request for Tenancy Approval (RFTA), modification of rent reasonableness comparable process and modification of HAP/lease data population.

SDHC intends to conduct significant outreach to participant households to ensure all rental assistance participants are aware of the pending modifications to the rent calculations and definition of elderly household. The Achievement Academy will continue to provide all necessary services to ensure success.

Activity Metrics Information



METRIC	BASELINE	BENCHMARK	OUTCOME
CE #1: Agency Cost Savings <i>Total cost of task in dollars (decrease).</i>	\$1,586,149	\$1,268,919	
CE #2: Staff Time Savings <i>Total time to complete the task in staff hours (decrease).</i>	12,136	9,709	
CE #3: Decrease in Error Rate of Task Execution <i>Average error rate in completing a task as a percentage (decrease).</i>	17%	15%	
CE #5: Increase in Agency Rental Revenue <i>Total household contributions towards housing assistance (increase)</i>	\$47,360,952	\$52,097,047	
SS #1: Increase in Household Income <i>Average earned income of households affected by this policy in dollars (increase).</i>	\$18,586	\$20,445	
SS #3: Increase in Positive Outcomes in Employment Status (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program	50 29 16 32	63 36 20 40	
SS #6: Reducing Per Unit Subsidy Costs for Participating Households <i>Average amount of Section 8 and/or Section 9 subsidy (or local, non-traditional subsidy) per household affected by this policy in dollars (decrease).</i>	\$1,107	\$996	
SS #8: Households Transitioned to Self Sufficiency <i>Number of households transitioned to self-sufficiency (increase).*</i> <i>*For purposes of the metric, self-sufficiency is defined as exiting a rental assistance program due to \$0 assistance rendered or voluntary surrender of assistance.</i>	0	120	

Projected Outcomes

- CE #1: The total cost of completing tasks related to calculating the family’s rent portion will decrease due to staff time savings. The baseline and benchmark have been updated to reflect the current HUD administrative reimbursement rate.
- CE #2: The total time to complete tasks related to calculating the family’s rent portion will decrease due to the elimination of medical allowances, and the total time to recertify a household will decrease due to the elimination of utility reimbursement payments and collecting information on utility responsibility. The baseline and benchmark have been updated to reflect the revised methodology to calculate this metric. The current metric to calculate staff time savings is to multiply the number of reexaminations by 1.35 hours. The multiplier has been reduced to 1.32 to reflect the elimination of utility allowances and medical allowances.
- CE #3: The average error rate for payment errors will decrease due to the simplified rent calculation.
- CE #5: The total household contributions toward assistance will increase slightly due to the elimination of medical allowances and the revision to the age of elderly households.
- SS #1: There are no anticipated changes to household income.
- SS #3: There may be a slight increase in employment status due to the revision to the age of elderly households.
- SS #6: The baseline and benchmark for per unit subsidy costs for participating households has been updated to reflect the current average HAP for MTW households.
- SS #8: There are no anticipated changes to this metric.

Description of Data Sources for Metrics

Reports will be created in the housing management software to retrieve data related to the metrics and imported into an Excel spreadsheet for further analysis. Data will be analyzed on an annual basis.

Cost Implications

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SDHC anticipates long-term cost savings related to the measures contained in the proposed Path to Success model. The long-term cost savings cannot be definitively predicted due to fluctuations in household income, changes in payment standard amounts, inflation, and HUD funding levels and all factors associated with agency funding. However, SDHC can predict a Housing Assistance Payments (HAP) decrease in the first two years of implementation, as well as staff cost savings, when not taking into account other factors that impact monthly HAP costs including fluctuations in housing income, increases in payment standards, inflation, and HUD funding levels.

Need/Justification for MTW Flexibility

MTW Agreement Attachment C, Section B (3) containing waivers of Section 3 (b)(3) and (G) of the 1937 Act and 24 C.F.R. 5.403; Section C(11) containing waivers of Section 3(a)(2), 3(a)(3)(A) and Section 6(l) of the 1937 Act and 24 C.F.R. 5.603, 5.611, 5.628, 5.630, 5.632, 5.634 and 960.255 and 966 Subpart A; Section D(1) containing waivers of Section 8(o)(7) of the 1937 Act and 24 C.F.R. 982.162; Section D(2)(a) containing waivers of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518; Section D(2)(c) containing waivers of Section 8(o)(10) of the 1937 Act and 24 C.F.R. 982.507;

Rent Reform/Term Limit Information (if applicable)

Impact Analysis

Medical Allowances

There is no anticipated impact to current participating households because all households who currently have a medical allowance will continue to receive one. A hardship policy will be established to assist households who have medical expenses exceeding \$10,000.

Elderly/Disabled Rent Reform

The impact analysis reviews current households who are between 50 and 54 years old who are Work-Able, and what their change in rent portion would be at the Elderly/Disabled Total Tenant Payment calculation. There would be no immediate impact to the participating households in this cohort, as their tenant portion calculation would remain the same. Once the population meets the revised definition of elderly household (to 62 years old), the analysis shows that 61% of households in this cohort would experience a decrease in their rent portion, and 39% would experience an increase in their rent portion.

Impact Analysis					
Percent of Work-Able Households Between 50 and 54 Years Old with a Change in Rent Portion					
Decrease in Rent Portion				Increase in Rent Portion	
\$1 - \$50	\$51 - \$100	\$101 - \$150	> \$200	\$1 - \$50	\$51 - \$88
25%	7%	5%	23%	26%	13%

For Elderly/Disabled households, where the households current designation is solely due to the household being considered elderly (but under 62 years of age), and experience a rent increase greater than \$50, SDHC will adopt a policy similar to the Kin Gap Inclusion Hardship Policy (previously approved by HUD), and the family will be approved for a one year exemption to the reform. Less than 550 existing households are in this category. The impact analysis utilized the minimum rent for the Work Able program to review potential impact to this cohort. Based on this approach it was projected that 61% would see a rent increase of less than \$100 and 39% would see a rent increase of greater than \$100. However, due to the tiered rent schedule in the Work Able program, and the possibility of other changes that normally occur such as fluctuations in household income, changes in household composition, and increases in payment standards it is not possible to predict the actual impact one implemented. However, households who experience a rent increase greater than \$50 when the reform is implemented, will be approved for a one year exemption to the reform. Other hardship considerations would follow the existing Path to Success Comprehensive Hardship Policy.

Utility Reimbursement Payment

The savings experienced from removing utility reimbursement payments will provide greater flexibility by allowing more funds to be allocated toward housing assistance payments. The table below provides an overview of the impact of the policy to rental assistance families. Of the households that the reform would be applied to, 30% would see no change, 53% would experience an increase between \$1 and \$50, and only 17 percent of households will experience an increase over \$50.



Impact Analysis					
Impact to Household Rent Portion					
No Change	Increase in Rent Portion				
\$0	\$1 - \$50	\$51 - \$100	\$101 - \$150	\$151 - 200	> \$200
30%	53%	9%	6%	2%	0%

Path to Success Hardship Policies

SDHC constructed hardship policies for subpopulations identified as requiring consideration of their respective situations which may prohibit growing income to match the Path to Success requirement to pay a higher rent portion over time to encourage self-sufficiency. The hardship policies will be applied on a case-by-case basis. The appropriate language surrounding the hardship policy is contained in the Administrative Plan, and procedures have been drafted to ensure consistent application of the hardship policies.

SDHC recognizes instituting progressive minimum rents may impact some families to a greater degree than others. Hardship policies were developed and implemented to ensure fragile households are able to navigate the minimum rents effectively.

SDHC appointed an internal Hardship Review Committee which reviews and makes determinations on all hardship requests. Hardship exemptions are temporary. During the hardship exemption period, the family's monthly rent portion is reduced to an acceptable rent burden percentage: 45 percent of adjusted monthly income for Work-Able families and 40 percent for Elderly/Disabled families. All families approved for the hardship exemption are referred to a WRS to receive supportive services. The purpose of the WRS is to assist the families in regaining employment by engaging in a rigorous individualized service plan. The Hardship Rent Table will be used in the application of the hardship rent portion for the duration of the exemption.

Hardship Rent Table	
Annual Income	Hardship Rent
\$0 - \$4,999	\$0
\$5,000 - \$9,999	\$125
\$10,000 - \$14,999	\$250
\$15,000 - \$19,999	\$375

Zero Income: Any family whose income is reduced to zero will have a zero rent portion if the loss is through no fault of their own. The exemption will have a duration of six months maximum after which time their rent portion will default to the applicable minimum rent. Work-Able zero income families will be required to sign a document consenting to participate in required self-sufficiency activities, which may include attending work-readiness classes/workshops, applying for benefits, regaining employment, etcetera. The families will be referred to the Achievement Academy to work closely with a Work Readiness Specialist (WRS) during the temporary hardship exemption. At the point the exemption ceases, the family will be responsible to pay a rent portion calculated using Path to Success methodology.

Minimum Rent: The family, whether Work-Able or Elderly/Disabled, must request a hardship exemption in writing. Requirements for consideration are as follows:

- Family's shelter burden must be greater than the acceptable level as calculated by SDHC.
- The family must either be Elderly/Disabled or consist of a single Work-Able adult with one or more dependents.
- Gross income before exclusions is considered.
- Family must sign a document consenting to participate in Achievement Academy work-readiness services.

Hardship for Medical Expenses: In order to accommodate families with extremely high medical expenses, families with medical expenses of \$10,000 or more will receive a medical deduction in that actual amount of qualified medical expenses.

Hardship for Utility Allowances: For Elderly/Disabled households who experience a rent increase greater than \$50.00, SDHC will adopt a policy similar to the Kin Gap Inclusion Hardship Policy (previously approved by HUD), and the family would be approved for a one year exemption to the reform. For Work Able households the existing Path to Success Comprehensive Hardship Policy would apply.

Hardship for Elderly/Disabled Designation: For Elderly/Disabled households, where the households current designation is solely due to the household being considered elderly (but under 62 years of age), and experience a rent increase greater than \$50.00, SDHC will

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adopt a policy similar to the Kin Gap Inclusion Hardship Policy (previously approved by HUD), and the family will be approved for a one year exemption to the reform.

Fragile Households: SDHC will consider special situations on a case-by-case basis for admission to the Elderly/Disabled population. The Hardship Review Committee will make a recommendation to a Senior Leadership representative in Rental Assistance, or a designated alternate staff member, who will have final approval in such extraordinary circumstances.

2018-1. MOVING HOME: A RAPID REHOUSING PROGRAM (RE-PROPOSED)

Activity Description

SDHC is re-proposing its Moving Home program, a local rapid rehousing program, which utilizes MTW funds to provide housing subsidies to individuals and households experiencing homelessness while supportive services are provided to strengthen stabilization. The current Moving Home program is modeled after traditional rapid rehousing programs and has been a successful component of San Diego's homelessness response system. Building on the success of Rapid Rehousing both as a national model and within our local program, SDHC proposes to expand Moving Home to encompass a rapid stabilization component for individuals and households who are experiencing significant housing instability and are considered highly or especially vulnerable should they lose their housing. At a national level the United States Interagency Council on Homelessness (USICH) has begun to focus its attention on the critical need to reduce inflow into the homelessness response system and elevate the need for [upstream prevention](#). SDHC has been a leader locally on prevention efforts since launching its locally funded programs in 2017 for households at imminent risk of homelessness. SDHC strongly supports this recent national shift towards upstream prevention and not solely 'fail first' programming that requires households (regardless of their level of vulnerability) to become literally homeless before higher level intervention resources such as rapid rehousing rental assistance and supportive services can be accessed. The National Alliance to Address Homelessness has recommendations for objective assessments to identify the level of vulnerability of households with high needs. A program that can narrowly target those highly vulnerable households with stabilization resources before they experience the damaging crisis of literal homelessness will reduce inflow to the homeless response system, mitigate the damaging health effects of homelessness on highly vulnerable sub-populations and quickly stabilize households. This expansion of Moving Home would utilize the same principles and best practices of Rapid Rehousing programs, providing rental assistance and supportive services tailored to meet the household needs, only providing the support necessary to stabilize the household, providing rental assistance that can be adjusted over time with a goal of exiting the stabilized household to a permanent sustainable housing situation.

This Moving Home expansion component could be implemented as a three-year pilot which would provide services such as housing relocation support (when finding a more affordable unit is necessary), stabilization services, and rental assistance to individuals and households who have been identified through referrals from 211, under a formal Memorandum of Understanding, and through SDHC's Housing First San Diego Hotline. Both referral mechanisms are existing, well-established avenues for households in housing crisis to access SDHC's existing prevention and diversion programs.

Moving Home's rapid rehousing component will continue to serve individual and households residing on the street, or in an emergency shelter. The program will also continue to provide short-term transitional subsidies for individuals transitioning from other federally funded rapid re-housing programs to ensure stability during the transition.

SDHC seeks to use broader uses of funding authority to provide the financial support for subsidy and program related expenses. Along with the existing rapid rehousing program, SDHC anticipates it could provide up to \$3 million of MTW funds annually to financially support the expanded component of the Moving Home program, consisting of rental assistance, support services, and administration. In addition to the households served annually through the rapid rehousing component of the Moving Home program, SDHC anticipates providing housing to approximately 150 to 250 households annually through its pilot stabilization component. The number served and budget may increase based on increases in the local rental market or if the local program is determined successful.

The Moving Home rapid rehousing and rapid stabilization program(s) also ensure an array of resources are available to individuals and households to stabilize and maintain housing while working towards financial independence. SDHC staff will provide support services such as:

- Housing search
- Tenant counseling
- Build basic tenancy skills, including understanding lease requirements, and helping arrange utilities
- Making moving arrangements, including providing financial assistance for moving costs and move-in kits



- Mediation with property owners and landlords
- Developing, securing and coordinating services
- Providing information and referrals to other providers
- Developing an individualized housing and service plan, including planning a path to permanent housing stability
- Access to SDHC's Achievement Academy services

The housing subsidy combined with supportive services ensures program participants have adequate time to stabilize and achieve self-sufficiency. By assisting individuals and households to rapidly stabilize in permanent housing, Moving Homes rapid rehousing and rapid stabilization components will reduce the number of San Diegans experiencing literal homelessness and the length of time San Diegans remain in homeless shelters. This will increase the availability of beds for other persons experiencing homelessness requiring immediate shelter, while also reducing the public and personal costs of homelessness.

Program Duration and Subsidy Calculation Methodology: The Moving Home program(s) will be two-year program(s) with the option of a one-year extension, granted as a safety net for participants requiring additional time to stabilize. The initial subsidy will be determined at program entry, re-determined within the first 90 days, and then recertified annually until the conclusion of program participation. Subsidies will not exceed SDHC's published payments standards. The minimum rent at program entry will be \$0. Income will be verified using a verification of income form and will require third-party documentation as part of the verification process. The methodology for subsidy determination is based on proven best practices among nationwide rapid rehousing programs and allows households stability as they strive to increase earned and or benefit income amounts and/or reduce other expenses through home sharing, family reunification, accessing long term affordable housing or other similar opportunities. The subsidy determination will consider local factors such as the cost of housing in San Diego as well as standards utilized by similar programs currently operating in the community.

The proposed methodology to determine the subsidy uses a graduated rent structure. During the first 90 days of the program, SDHC will pay a percentage of the participant's contract rent, based on household need and income at program entry (up to 100 percent in some circumstances). After 90 days of program participation, SDHC will reevaluate the participant's annual income and progress made towards achieving stability and economic self-sufficiency. If income levels increase to a level supporting a decrease in subsidy provided by SDHC, the percentage of the contract rent paid by SDHC will be reviewed and reduced. This methodology will continue until the participant is determined to be able to support the majority of the contract rent without being significantly rent burdened. At this point, the participant will transition from the program. Please note: The intervals of reevaluating a participant's income as well as the percent of contract rent paid are approximate. SDHC anticipates adjusting the model according to the individualized service plans of program participants as well as lessons learned during the pilot time of the expansion component. Although the MTW rapid re-housing and rapid stabilization models are informed by national best practice, it is anticipated that local needs may result in modification of the national model to more efficiently and effectively serve local constituents.

Administration: SDHC will maintain the administrative functions for determining initial and on-going programmatic eligibility. SDHC will document the participant's income levels upon admission into the program and certify income levels and household circumstances annually using a streamlined process.

For purposes of initial eligibility, criminal history will not be reviewed with the exception of sex offender status and arrests/convictions resulting from manufacturing methamphetamine in federally assisted housing. Federal and/or state registration as a sex offender and/or involvement with the aforementioned methamphetamine activities will preclude individuals from participating in the program.

Participants will be required to apply to the HCV tenant-based waitlist upon program admission. Participants will not automatically become eligible for a tenant-based voucher upon termination of program participation and must proceed through the waitlist process to obtain a tenant-based voucher.

SDHC will also provide the supportive services as described in the preceding paragraph. Participant data will be stored in SDHC's housing management software and the local Housing Management Information Systems (HMIS) to ensure both outputs and outcomes are captured accurately.

HQS Inspections: for new move-ins, inspections will be conducted at program admission and annually thereafter. Initial inspections will be conducted if the family moves to another unit. All SDHC HQS guidelines apply to the program. For the expanded stabilization pilot, habitability inspections would be utilized.



Waitlist: For the rapid rehousing component, San Diego’s Coordinated Entry System (CES) will continue to be utilized in lieu of a waitlist, homeless individuals and families who have been evaluated by the CES standardized vulnerability assessment tool as best served by the rapid rehousing model will be served. For Moving Homes rapid stabilization pilot, referrals would be received from 211 and through SDHC’s Housing First San Diego Hotline. Program admissions will be prioritized according to local standards (utilizing the current Community Prioritization for Homelessness), level of acuity, and overall vulnerability determined via the appropriate assessment tools.

Statutory Objectives

The activity will achieve the statutory objective of increasing housing choice to low-income families since the activity results in additional housing resources within the City of San Diego.

Anticipated Impacts

The anticipated impact of the initiative will be creating another mechanism to serve highly vulnerable households and homeless residents of San Diego with a local approach. Under the initiative, an increased number of housing resources will be available to prevent and end homelessness. Additionally, SDHC expects to increase self-sufficiency and reduce the recidivism of program participants by helping participants to obtain employment and increase income amounts to achieve financial stability.

Anticipated Timeline to Achieve Objectives

SDHC will implement the program effective July 1, 2017 and expects to achieve all benchmarks at the conclusion of the three-year pilot era.

Activity Metrics Information

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METRIC	BASELINE	BENCHMARK	OUTCOME
CE #1: Agency Cost Savings <i>Total cost of task in dollars (decrease).</i>	\$1,001,130	\$800,904	
CE #2: Staff Time Savings <i>Total time to complete the task in staff hours (decrease).</i>	7,800	6,240	
CE #3: Decrease in Error Rate of Task Execution <i>Average error rate in completing a task as a percentage (decrease).</i>	17%	4%	
CE #5: Increase in Agency Rental Revenue <i>Total household contributions towards housing assistance (increase)</i>	\$0	\$62,400	
SS #1: Increase in Household Income <i>Average earned income of households affected by this policy in dollars (increase).</i>	\$0	\$10,000	
SS #3: Increase in Positive Outcomes in Employment Status (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program	22 7 8 4	38 56 6 18	
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) <i>Number of households receiving TANF assistance (decrease)</i>	18	5	
SS #5: Households Assisted by Services that Increase Self Sufficiency <i>Number of households receiving services aimed to increase self-sufficiency (increase)</i>	\$0	\$50	
SS #6: Reducing Per Unit Subsidy Costs for Participating Households <i>Average amount of Section 8 and/or Section 9 subsidy (or local, non-traditional subsidy) per household affected by this policy in dollars (decrease).</i>	\$1,288	\$1,159	
SS #7: Increase in Agency Rental Revenue <i>Total household contributions toward housing assistance (increase)</i>	\$0	\$88,934	
SS #8: Households Transitioned to Self Sufficiency <i>Number of households transitioned to self-sufficiency (increase).*</i> <i>*For purposes of the metric, self-sufficiency is defined as exiting a rental assistance program due to \$0 assistance rendered or voluntary surrender of assistance.</i>	0	96	

Projected Outcomes

- CE #1: Moving Home will generate administrative savings related to the cost of staff hours required to administer the program. The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.
- CE #2: Fewer staff hours are required to administer Moving Home than a traditional voucher program, thus resulting in a decrease of staff hours.
- CE #3: The simplified subsidy calculation will result in decreased payment error.
- CE #5: Increases in rental revenue result from the programmatic costs savings generated by the reduction in staff hours required to administer the streamlined program.
- SS #1: At least 20% of households will increase annual earned income amounts as a result of services offered via the Achievement Academy and other partnerships.
- SS #3: At least 65% of households will obtain employment or be connected to eligible benefits to ensure housing stability upon program exit.
- SS #4: SDHC anticipated services providing in the Moving Home program will increase employment opportunity, thus resulting in decreased reliance on TANF.
- SS #5: An increased number of households will receive services to increase self-sufficiency under the Moving Home program.
- SS #6: The subsidy calculation will reduce the average subsidy costs for the provision of rental assistance for program participants. The baseline and benchmark for per unit subsidy costs for participating households has been updated to reflect the current average HAP for Moving Home households.
- SS #7: Rental revenue will increase proportional to the decrease in average subsidy costs.
- SS #8: At least 80% of households will transition into permanent housing upon program exit.

Description of Data Sources for Metrics

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Reports will be created in the housing management software and HMIS to retrieve data related to the metrics and imported into an Excel spreadsheet for further analysis. Data will be analyzed on an annual basis and summarized in dashboard format.

Cost Implications

The budget for the proposed pilot expansion is anticipated to be up to \$3,000,000 annually for the first two years, decreasing in year three.

Need/Justification for MTW Flexibility

Broader Uses of Funds Authority amendment. SDHC will adhere to all requirements set forth in PIH Notice 2011-45.

Broader Uses of Funds Authority enables SDHC to create a local, non-traditional tenant-based rental assistance program.

Rent Reform/Term Limit Information (if applicable)

N/A



SECTION IV – APPROVED MTW ACTIVITIES

IMPLEMENTED ACTIVITIES

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IMPLEMENTED ACTIVITIES

2023-1.

PLAN YEAR APPROVED: 2023

BLENDING SUBSIDIES IN FAIRCLOTH-TO- RAD CONVERSIONS

RE-PROPOSED: N/A

DESCRIPTION

SDHC received permission for blended subsidies using MTW funds for Faircloth to RAD conversions. SDHC has been actively involved in creating and preserving additional affordable housing within the City of San Diego in other approved MTW activities through acquisitions, rehabilitations, and new developments. In addition, SDHC has an active activity relating to public housing development. Documentation from the PIH office of Capital Improvements, as of September 30, 2021, showed that SDHC had an availability of 1,220 units remaining under the Faircloth limit. Due to the remaining units in SDHC's Faircloth cap, SDHC is actively considering researching opportunities where a Faircloth-to-RAD conversion would be beneficial. This activity would be utilized to make up the difference between the combined tenant paid portion and the RAD HAP subsidy up to the contract rent for converted units.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2022-1.

PLAN YEAR APPROVED: 2022

HOMEOWNERSHIP PROGRAM

RE-PROPOSED: N/A

DESCRIPTION

Using Broader Use of Funds Authority, SDHC allocated up to \$5 million towards the existing first-time homebuyer's programs, which should assist around 50 families under 80% AMI in being able to purchase a home in the City of San Diego. Currently, SDHC receives funding for its homeownership programs via HOME, Community Development Block Grants (CDBG), California CalHome Program funds, and the City of San Diego Affordable Housing Fund.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2021-2.

PLAN YEAR APPROVED: 2021

PRESERVATION OF AFFORDABLE HOUSING IN THE CITY OF SAN DIEGO

RE-PROPOSED: N/A

DESCRIPTION

SDHC created a Local Non-Traditional, Property-Based activity to provide financing for the preservation and rehabilitation of properties that are not owned by SDHC. In seeking funding for preservation or rehabilitation, landlords will be incentivized to maintain the affordability of the units and improve housing stock as they provide safe, decent and sanitary dwelling units.

SDHC is committed to preserving affordable housing within the City of San Diego, by developing methods of financing to incentivize property owners to preserve their existing affordable housing units. Financing received through SDHC will help these property owners complete necessary health and safety upgrades to dwelling units that could normally be cost-prohibitive, leading to an increase in rent for tenants. In receiving this funding, this ensures that properties receiving SDHC funds remain affordable to low-income families for the foreseeable future.

During FY 2021 and FY 2022, NOFAs were developed aimed at the preservation of deed-restricted and naturally occurring affordable housing (NOAH).

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2021-1.

ESTABLISHMENT OF ALTERNATIVE REASONABLE COST LIMITS

PLAN YEAR APPROVED: 2021

RE-PROPOSED: N/A

DESCRIPTION

SDHC received permission to develop alternative reasonable cost limits to include Total Development Costs (TDC) and Hard Construction Costs (HCC) for the amount of Moving to Work funds that can be contributed in SDHC's local non-traditional development and rehabilitation activities. Over the past several years, the San Diego metropolitan area has seen massive increases in the cost to develop and rehabilitate new and existing properties.

SDHC has seen multiple projects exceed HUD-published limits for the San Diego region, as the Rental Housing Finance Division is a lender, conduit bond issuer, and administrator of the City of San Diego's affordable land use programs including the Inclusionary, Density Bonus, Single-Room Occupancy, and Coastal Replacement Housing ordinances. Using the alternative reasonable cost formula, SDHC was able to increase its ability to ensure that more affordable units are developed or rehabilitated within the City of San Diego.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2020-1. LANDLORD

RETENTION AND INCENTIVE PROGRAM

PLAN YEAR APPROVED: 2020

RE-PROPOSED: N/A

DESCRIPTION

The Landlord Partnership Program (LPP) aims to expand rental opportunities for families holding housing choice vouchers by making landlord participation in the program more attractive by providing both financial and supporting incentives to landlords who rent to HCV Program participants within the City of San Diego.

Incentives are designed to recruit new landlords and units as well as retain existing units within the portfolio of available housing.

Prior Updates

- FY 2023: Landlord Partnership Assurance Fund: For damages caused by tenant beyond normal wear and tear or failure to pay rent, landlords may request assurance funds to cover expenses that exceed security deposits. Landlords can access assurance funds only within first two years of new tenancy. SDHC will establish a maximum permissible award per tenancy. The maximum will be determined by SDHC using the local market averages and may be adjusted for inflation, the proposed budget for this fund is \$250K.
- FY 2022: SDHC included other eligible expenses related to the leasing of units and recruitment/retention of HCV owners to facilitate the successful leasing and use of housing vouchers by families. This may include, but not be limited to, application fees, processing fees, holding deposits, landlord recruitment and incentive payments, such as unit hold payments, to assist families with various up-front costs for leasing units in an expedited manner.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2018-1. MOVING

HOME: A RAPID REHOUSING PROGRAM

PLAN YEAR APPROVED: 2018

RE-PROPOSED: N/A

DESCRIPTION

Using Broader Uses of Funds Authority, SDHC created rapid re-housing program to provide housing subsidy to families at-risk of homelessness. Subsidies are provided to the families while receiving services to ensure housing stability while gaining financial independence.

Prior Updates

- FY 2020: The program budget was increased to \$5 million in a technical amendment approved in April 2020 due to COVID-19.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: Moving Home has been re-proposed in the FY 2024 MTW Annual Plan to include a rapid stabilization component.



IMPLEMENTED ACTIVITIES

2017-1. THE MOVING ON PROGRAM

PLAN YEAR APPROVED: 2017

RE-PROPOSED: N/A

DESCRIPTION

Using Broader Uses of Funds Authority, SDHC created a pilot program to provide housing subsidy to formerly homeless individuals and families no longer requiring a permanent supportive housing solution to sustain housing stability.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2016-3. HOMELESS SHELTER BEDS

PLAN YEAR APPROVED: 2016

RE-PROPOSED: N/A

DESCRIPTION

In FY 2016, SDHC received approval under Broader Uses of Funds Authority, to subsidize shelter beds in the City of San Diego. Shelter programs serve a variety of needs and subpopulations. SDHC and regional partners have identified, similar to housing interventions, that a continua of options is needed to engage certain sub-populations, especially those that are historically hesitant to enter traditional congregate shelter. This approach aligns with the goals and practices set forth in the Community Action Plan on Homelessness for the City of San Diego. All contracted programs are required to follow Housing First principles with low barriers to entry and align with regional Continuum of Care community standards and national best practices as detailed in contracted scopes of work. In alignment with national best practice to provide low-barrier shelter access, only criminal history related to life-time sex offender status and convictions resulting from manufacturing methamphetamine in federally assisted housing will be considered.

Prior Updates

- FY 2022: SDHC will provide MTW funding to shelter providers through a competitive process, to develop and/or acquire new family congregate sites. In addition, the program budget will be increased to \$12.8 million, based on an average cost of \$52.06 per night.
- FY 2020: The program MTW budget was increased to \$8 million.

PLANNED NON-SIGNIFICANT CHANGES: SDHC may provide MTW funding to homelessness sector providers through a competitive process, to develop and/or acquire new traditional congregate or alternative safe sheltering sites. In addition, the program budget is anticipated to remain at \$12.8 million.

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2016-2. THE GUARDIAN SCHOLARS PROGRAM

PLAN YEAR: 2016

RE-PROPOSED: N/A

DESCRIPTION

Using Broader Uses of Funds Authority, SDHC provides funding to San Diego State University to assist students with the housing component of their education. The target population is former foster care youth, wards of the court, or unaccompanied homeless youth. SDHC provides \$200,000 annually and matches up to an additional \$400,000 of philanthropic funds for an aggregate total of \$600,000 annually.

Prior Updates

- FY 2023: The SDHC will determine how frequently it will revisit based on market trends and funding availability the compensation to award the program
- FY 2021: A modified alternate HQS policy will be used for the units funded through the program.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2016-1. THE MONARCH SCHOOL PROJECT

PLAN YEAR: 2016
RE-PROPOSED: 2020

DESCRIPTION

Using Broader Uses of Funds Authority, SDHC created a pilot program to provide housing subsidy to homeless families with minors enrolled in Monarch School. The Achievement Academy delivers work readiness services (such as job placement and training) to the adult family members.

Prior Updates

- FY 2020: Activity was re-proposed, broadens the initiative to allow for permanent supporting housing as required.
- FY 2018: Activity now utilizes the Coordinated Entry System (CES) for programmatic referrals.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2015-1. MODIFY THE 40 PERCENT RENT BURDEN REQUIREMENT

PLAN YEAR: 2015
RE-PROPOSED: N/A

DESCRIPTION

Modifies the 40 percent affordability cap to 50 percent at initial lease-up in order to increase housing choice for low-income households.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2014-2. LOCAL INCOME INCLUSION

PLAN YEAR: 2014
RE-PROPOSED: N/A

DESCRIPTION

Income from Kin-GAP, foster care payments, and adoption assistance payments is included in the determination of the household's annual adjusted income. The activity utilizes waivers allowing for an alternate rent calculation methodology.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2013-6. TRANSITIONAL PROJECT-BASED SUBSIDIES FOR THE HOMELESS

PLAN YEAR: 2013

RE-PROPOSED: N/A

DESCRIPTION

Utilizing Broader Uses of Funds Authority, SDHC partners with agencies to craft a transitional housing program using project-based subsidies paired with supportive services, offered by the selected provider agency. SDHC is currently partnering with PATH, Episcopal Community Services, and Senior Community Center in this endeavor.

Prior Updates

- FY 2022: SDHC revised the maximum subsidy to be aligned with the HCV housing assistance payments per unit cost (PUC) per bed, and this may be adjusted periodically to account for rising costs of administering the program including, but not limited to, rising rental costs.
- FY 2020: A modified alternate HQS policy will be used for the beds funded through the program.
- FY 2017: The target populations are expanded to include homeless veterans and victims of human trafficking.
- FY 2016: Due to the success of the activity, SDHC is expanding the program to include funding beds in addition to units. The maximum subsidy is \$700 per bed. The target populations are expanded to include homeless veterans and victims of human trafficking.
- FY 2015: RFP solicitation process to include for-profit entities in addition to non-profit entities. Additionally, SDHC may award the subsidies to an SDHC-owned development without a competitive process. Partnering agencies may utilize the VI-SPDAT model to refer applicants for the housing program.

PLANNED NON-SIGNIFICANT CHANGES: Project-based subsidy for these programs will be awarded on a competitive basis. The exception will be if the program is housed in an SDHC-owned and/or SDHC-controlled development (for example long-term, master lease), in which case the subsidy will be awarded non-competitively, per a prior HUD-approved MTW activity.

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2013-4. PUBLIC HOUSING: FLAT RENT ELIMINATION

PLAN YEAR: 2013

RE-PROPOSED: N/A

DESCRIPTION

Eliminate flat rents in public housing in order to facilitate the implementation of Path to Success for public housing residents. The activity utilizes waivers allowing SDHC to determine alternative rent policies within the public housing program.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2013-2. FAMILY SELF-SUFFICIENCY REINVENTION

PLAN YEAR: 2013

RE-PROPOSED: 2015

DESCRIPTION

Modifies the Family Self-Sufficiency (FSS) program by revising the contract term and the escrow calculation method to coincide with the Path to Success initiative. Changes to the program include a \$10,000 maximum on total escrow accumulation, escrow deposits based on outcomes achieved, and a two-year contract term with the option to extend the contract an additional three years if additional time is needed to attain goals.

Prior Updates

- FY 2022: HUD published the FSS Program Final Rule effective June 16, 2022. SDHC adopted the final rule, but will keep the flexibilities approved under the existing MTW FSS Program Activity.
- FY 2015: Activity was re-proposed to allow an adult household member to enroll in the program as the sole participant
- FY 2014: The FSS Action Plan detailing the flat escrow deposit feature of the program is pending submission to HUD for approval. The flat escrow deposit schedule containing the outcomes and the corresponding deposit amounts will be further described in the Fiscal Year 2013 MTW Annual Report.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2013-1. MTW VASH PROGRAM

PLAN YEAR: 2013

RE-PROPOSED: N/A

DESCRIPTION

Program features include the elimination of minimum rent for an initial time period, streamlined criminal history requirements for household members, and additional streamlining measures implemented using differing rent calculation and eligibility methodologies. On April 1, 2020, SDHC received approval to have VASH payment standards tied to 120% of the three Choice Communities payment standards.

Prior Updates

- FY 2023 – To support ongoing housing stabilization for VASH clients, SDHC extended the \$0 minimum rent requirement.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2012-3. MODIFY FULL-TIME STUDENT DEFINITION

PLAN YEAR: 2012

RE-PROPOSED: N/A

DESCRIPTION

Modifies the full-time student definition to include only students ages 18 to 23 who are not the head, spouse, or co-head. Household members meeting the revised full-time student definition will receive a 100 percent employment income exclusion. All students, regardless of age or familial status, will be eligible for a graduation incentive wherein proof of graduation can be submitted in exchange for a monetary award. The activity utilizes waivers allowing SDHC to calculate rent using alternative methodologies.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2012-2. BIENNIAL REEXAMINATION SCHEDULE

PLAN YEAR: 2012

RE-PROPOSED: N/A

DESCRIPTION

A biennial reexamination schedule for the Work-Able and Elderly/Disabled population implemented using the authority to redefine the cycle utilized for the full reexamination of income and household composition.

Prior Updates

- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2016: SDHC converted the Elderly/Disabled population to a Biennial Reexamination Schedule effective July 1, 2015.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2012-1. PATH TO SUCCESS

PLAN YEAR: 2012

RE-PROPOSED: 2014, 2019

DESCRIPTION

A comprehensive rent reform model utilizing a tiered rent structure with progressive increases to minimum rents. The model eliminates deductions and streamlines allowances. Path to Success only applies to families considered Work-Able. Families defined as Elderly/Disabled receive streamlining measures and are not subject to Path to Success.

Prior Updates

- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2019: The activity was re-proposed to increase minimum rents for Work-Able families and modify income bands to \$5,000 for all ranges.
- FY 2014: Re-proposed to include a local portability policy. The local portability policy component of the activity was implemented effective November 1, 2013. The standard HCV calculation may be used in PBV complexes servicing special needs populations.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: Path to Success has been re-proposed in the FY 2024 MTW Plan to include changes to medical allowances, utility allowance, and household age designation.

2011-8. SPONSOR-BASED SUBSIDIES FOR THE HOMELESS

PLAN YEAR: 2011

RE-PROPOSED: 2013, 2017

DESCRIPTION

The local, non-traditional program created using Broader Uses of Funds Authority provides subsidies to individuals identified as homeless. Program participants receive housing and supportive services from sponsor organizations. Update: The Churchill development was allocated 72 sponsor-based subsidies in lieu of project-based vouchers.

- *Prior Updates* Baselines, benchmarks, and metrics were modified in the Fiscal Year 2017 Plan due to the re-proposal.
- FY 2017: Re-proposed to streamline the subsidy calculation process using the Path to Success rent calculation, and expands the populations served including both individuals and families.
- FY 2016: RFP solicitation process to include for-profit entities in addition to non-profit entities. Additionally, SDHC may award the subsidies to an SDHC-owned development without a competitive process. Partnering agencies may utilize the VI-SPDAT model to refer applicants for the housing program. Due to the success of the activity, SDHC is expanding the program to include funding beds in addition to units. A modified alternate HQS policy will be used for the beds funded through the program.
- FY 2013: Re-proposed to allow SDHC to allocate additional vouchers to the program, broaden the definition of homelessness, and apply MTW flexibilities to the rent calculation methodology.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2011-7. DEVELOPMENT OF PUBLIC HOUSING UNITS USING A COMBINATION OF FUNDS

PLAN YEAR: 2011

RE-PROPOSED: N/A

DESCRIPTION

SDHC creates/preserves public housing, without a competitive process, using acquisition and rehabilitation as the method of development.

Prior Updates

- FY 2014: Waivers corrected in the Fiscal Year 2012 Report to include MTW Agreement Attachment C, Section B(1)(b)(ii), B(1)(b)(vii) and B(1)(b)(viii) containing waivers of Sections 8 and 9(g)(3) of the 1937 Act and 24 CFR 982 and 990. MTW Agreement Attachment C, Section C (13) containing waivers of 24 CFR 941.40.
- FY 2013: This initiative was combined with the Fiscal Year 2010 Public Housing Development activity.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2011-6. MODIFY EIV INCOME REVIEW SCHEDULE

PLAN YEAR: 2011
RE-PROPOSED: N/A

DESCRIPTION

SDHC utilizes the EIV report only when processing full reexaminations of household composition, income, and assets according to the Biennial reexamination cycles. Waivers allow SDHC to adopt and implement policies for verifying family income and determining resident eligibility differing from current program requirements. The requirement to use the EIV report during interim certifications is eliminated.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2011-4. ACQUISITION AND DEVELOPMENT OF ADDITIONAL AFFORDABLE UNITS

PLAN YEAR: 2011
RE-PROPOSED: 2014

DESCRIPTION

Uses Broader Uses of Funds Authority to acquire affordable housing units in San Diego using MTW funds.

Prior Updates

- SDHC continues to explore viable opportunities to create affordable housing.
- FY 2022: Any income that is generated from SDHC-owned properties developed through this initiative will be used for MTW-approved purposes like affordable housing.
- FY 2021: Any income that is generated from SDHC-owned properties developed through this initiative will be used for affordable housing purposes.
- FY 2020: SDHC is utilizing the initiative to develop accessory dwelling units (ADUs) per local ordinances to increase affordable housing options in the City of San Diego.
- FY 2014: Re-proposed to expand the methods of affordable housing development available to SDHC.
- FY 2012: Clarify that it will use this authority to preserve as well as acquire affordable housing in the City of San Diego.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2011-3. TWO YEAR OCCUPANCY TERM FOR PBV TENANTS

PLAN YEAR: 2011
RE-PROPOSED: 2013

DESCRIPTION

Requires Project-Based Voucher holders to complete two years of occupancy before becoming eligible to receive a tenant-based voucher. Waivers allow SDHC to determine waiting list procedures differing from current program requirements. The Mason Hotel and Parker-Kier contracts contain this requirement.

Prior Updates

- FY 2016: The Fiscal Year 2012 Report increased the threshold of the vacancy policy from 15% to 35%, a percent consistent with the baseline vacancy rate. The policy change benefits PBV households.
- FY 2013: Re-proposed to allow SDHC to create a policy stating, "No more than 15% of the tenants in any given development who become eligible to transition to a tenant-based voucher in any given year and no more than 10% in any given month can move from the PBV assisted complex. Policy change effective 2/1/2014.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2011-2. AUTHORIZE COMMITMENT OF PBV TO SDHC- OWNED UNITS

PLAN YEAR: 2011

RE-PROPOSED: N/A

DESCRIPTION

Streamlines the process of committing PBV to agency-owned units by using waivers to allow SDHC to project-base units utilizing a non-competitive process.

Prior Updates

- FY 2015: PBV units were added to the Mason Hotel and Parker-Kier, developments owned by SDHC.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2011-1. ALLOW LOWER RENTS FOR NON-ASSISTANT UNITS IN SDHC- OWNED DEVELOPMENTS

PLAN YEAR: 2011

RE-PROPOSED: N/A

DESCRIPTION

Uses a revised rent reasonableness protocol to determine rent reasonableness for assisted units in developments owned by SDHC. Rent reasonableness for the voucher assisted units is determined by comparisons to similar units in the surrounding neighborhoods rather than within the development.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2010-9. EXPAND THE PROJECT-BASED VOUCHER PROGRAM

PLAN YEAR: 2010

RE-PROPOSED: 2015

DESCRIPTION

SDHC allocates a greater percent of budget authority to project-based vouchers to serve a variety of the homeless population and low-income households in the City of San Diego. Authorizations waived allow SDHC to project-base 100 percent of the units in a development; create project-specific waitlists; utilize creative measures to allocate PBV in vacant and foreclosed properties; and designate greater than 20 percent of SDHC's allocation to PBV.

Prior Updates

- FY 2022: New PBV developments focused on Permanent Supportive Housing (PSH) may use Certificates of Occupancy or Temporary Certificates of Occupancy in lieu of an HQS inspections for units. This allows for inspections that have been performed for satisfying Tax Credit or HOME program requirements, as well as inspections by other governmental agencies that are substantially equivalent to HQS requirements. Subsequent inspections shall follow the standard biennial HQS process.
- FY 2021: SDHC changed the rent change period from HAP anniversary month to reexamination month. This will further streamline the process by allowing rent increases to be processed concurrently with the reexamination on the optimized reexamination effective date
- FY 2015: Re-proposed to adopt additional flexibilities to require residents to participate in supportive services as a condition of tenancy; allow project-specific waiting lists maintained by the owners or non-profit providers; approve exception payment standards exceeding 110 percent of the FMR without requiring HUD approval; and increase the number of designated PBV units in a contract after the first three years of the contract have elapsed.

PLANNED NON-SIGNIFICANT CHANGES: In alignment with national best practice and housing first principles, engagement in supportive services is not a condition of tenancy. However, project-based programs that serve special populations are expected to make available a variety of supportive services to best meet a specific population's needs. These expectations are memorialized in contract documents.

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2010-7. ADOPT A LOCAL INTERIM CERTIFICATION POLICY

PLAN YEAR: 2010
RE-PROPOSED: 2012

DESCRIPTION

The local interim policy applies to non-elderly/non-disabled households and limits the number of interim adjustments to income to once in a 12-month timeframe. Additionally, decrease of income interims will be granted only if the loss of income is through no fault of the family, the decreased income results in a decrease to the rent portion greater than 20 percent, the decrease is not due to a sanction on public assistance income, and the family provides verification of eligibility or ineligibility for unemployment benefits if the reduced income is due to loss of employment.

Prior Updates

- Baselines, benchmarks, and metrics were modified in the Fiscal Year 2012 Plan Amendment due to the re-proposal.
- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2018: Effective July 1, 2018, SDHC eliminated the "No Fault of Your Own" policy as a reason to deny an interim request for a decrease in the rent portion. A review and analysis of the policy indicated minimal benefits.
- FY 2015: The policy applies to work-able families as defined under Path to Success. The activity utilizes the authority to implement an interim certification protocol differing from current mandates, thus allowing for locally driven policies concerning income change interims for families categorized as "Work-Able".
- FY 2012: Re-proposed to adopt a policies stating an interim adjustment of income will not be processed unless the change to the rent portion is greater than 20% and the loss of income must not occur through fault of the family.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2010-6. SIMPLIFY INCOME AND ASSET VERIFICATION SYSTEMS TO REDUCE ADMINISTRATIVE BURDEN

PLAN YEAR: 2010
RE-PROPOSED: 2016

DESCRIPTION

Restructures the verification hierarchy, and assets valued at less than \$10,000 are not verified. The activity utilizes the authority to adopt and implement policies to calculate the rent differing from program requirements.

Prior Updates

- FY 2016: Re-proposed to eliminate assets from the verification and rent calculation process, gain the ability to deny program admission to applicants owning homes, and incorporate activity 2011-5 into the initiative.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2010-5. STANDARDIZE UTILITY ALLOWANCES BY UNIT SIZE

PLAN YEAR: 2010
RE-PROPOSED: N/A

DESCRIPTION

A simplified utility allowance structure where the utility allowance amount is based on whether or not the family is responsible for the water portion of the utilities. The activity utilizes the authority to adopt and implement policies to calculate the rent differing from program requirements.

PLANNED NON-SIGNIFICANT CHANGES: SDHC proposes to eliminate utility reimbursement payments and the utility allowance schedule requirement and remove the requirement to collect, analyze, and report information on utility responsibilities for all households participating in Path to Success.

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None



IMPLEMENTED ACTIVITIES

2010-4. CHOICE COMMUNITIES

PLAN YEAR: 2010

RE-PROPOSED: 2012, 2018

DESCRIPTION

Using the authority to implement a reasonable policy to establish payment standards differing from current program requirements, the poverty de-concentration effort providing incentives for families to move to one of nine local opportunity areas by using the following:

1. Moving for Opportunity Program
2. Revolving Security Deposit Loan fund
3. Increase payment standards in low-poverty areas

Prior Updates

- FY 2018: Re-proposed to increase flexibility related to determining payment standards. Payment standards are informed by hypothetical SAFMRs published by HUD, the information available at the time of the analysis.
- FY 2016: A Fiscal Year 2015 activity increased the rent burden to 50 percent program wide. Thus, the component eliminating the 40 percent rent burden is eliminated.
- FY 2012: Re-proposed to adopt a policy allowing SDHC to calculate payment standards below 90% of the FMR in high-poverty areas.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: None

PLANNED SIGNIFICANT CHANGES: None

2010-2. AUTHORIZE THE SDHC TO INSPECT AND DETERMINE RENT REASONABLENESS FOR SDHC OWNED PROPERTIES

PLAN YEAR: 2010

RE-PROPOSED: N/A

DESCRIPTION

Utilizes a local procedure to conduct inspections and determine rent reasonableness for SDHC-owned properties are conducted by SDHC.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None

2010-1. IMPLEMENT A REVISED INSPECTION PROTOCOL

PLAN YEAR: 2010

RE-PROPOSED: N/A

DESCRIPTION

The modified inspection protocol reduces the number of required inspections by placing qualifying units on a Biennial Inspection Cycle and allowing owners to self-certify Housing Quality Standards for minor fail items.

Prior Updates

- FY 2020: A technical amendment was approved in April 2020 to allow for modifications to the activity during periods of emergency operations.
- FY 2016: Through the initiative, SDHC will modify the requirements to "gain entry" into every 24 months to make a "first attempt to access" the unit every 24 months to comply with Federal requirements.
- FY 2015: Modified the activity to remove the qualifying criteria and authorize placement of all MTW units onto a Biennial Inspection Cycle.
- FY 2014: Results for HQS inspections occurring before implementation of the activity may not be considered for purposes of placement on the biennial inspection cycle.

PLANNED NON-SIGNIFICANT CHANGES: None

PLANNED CHANGES TO METRICS / DATA COLLECTION: The baseline and benchmark for CE# 1 have been updated to reflect the current HUD administrative reimbursement rate.

PLANNED SIGNIFICANT CHANGES: None



NOT YET IMPLEMENTED ACTIVITIES

ACTIVITIES ON HOLD

**2010-8. ESTABLISH AN
HCV HOMEOWNERSHIP
PROGRAM**
PLAN YEAR APPROVED: 2010**RE-PROPOSED:** N/A**IMPLEMENT DATE:** OCT 01, 2009**HOLD DATE:** JUL 01, 2014**DESCRIPTION**

A homeownership program was created to assist income-eligible HCV participants with purchasing a home. Housing assistance payments are utilized to assist with a mortgage payment rather than as a rental payment. Incentives to purchase a foreclosed home are also program components. Waivers were enacted to modify the eligibility requirements for the program related to the minimum monetary threshold for savings accounts as well as implement the incentives for purchasing foreclosed homes.

REASON PLACED ON HOLD

The program was placed on hold due to decreasing housing stock and the resulting increasing housing prices, thus creating a housing market no longer accessible to low-income Housing Choice Voucher participants. New applications were no longer be accepted effective July 1, 2014 for the program. Families currently participating in the homeownership program continue to receive assistance.

STATUS UPDATE: None**ANTICIPATED REACTIVATION TIMELINE**

SDHC will evaluate the program annually to determine the feasibility of re-activating the program. Criterion to be evaluated will include the level of available housing stock, median housing prices, and the administrative capacity to increase the number of Housing Choice Voucher homeowners.

EXPLANATION OF NON-SIGNIFICANT CHANGES / MODIFICATIONS: Not Applicable

SECTION IV – APPROVED MTW ACTIVITIES: HUD APPROVAL PREVIOUSLY GRANTED

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CLOSED OUT ACTIVITIES

2014-4. HOUSING SUBSIDY PROGRAM FOR HOMELESS YOUTH	PLAN YEAR APPROVED: 2014 RE-PROPOSED: N/A DESCRIPTION Using Broader Uses of Funds Authority, SDHC created a time-limited pilot program to provide flat housing subsidies while a partnering agency delivers supportive services such as job placement, education, training, and case management. REASON(S) CLOSED OUT The activity was not implemented. SDHC published several competitive solicitations to procure a partner agency without success. Due to the inability to award a contract, SDHC closed out the activity.	IMPLEMENTATION DATE: N/A DATE CLOSED OUT: JULY 1, 2022
2014-1. TRANSITIONAL SUBSIDY PROGRAM FOR HOMELESS VETERANS	PLAN YEAR APPROVED: 2014 RE-PROPOSED: N/A DESCRIPTION Using Broader Uses of Funds Authority, SDHC partners with Veteran's Village of San Diego (VVSD) to craft a transitional housing program using flat subsidies paired with supportive services. SDHC provides the housing subsidy while VVSD provides the supportive services. REASON(S) CLOSED OUT Veteran's Village of San Diego, the intended partnering agency for the program, indicated a preference to pursue an alternative rental subsidy program.	IMPLEMENTATION DATE: JAN 01, 2014 DATE CLOSED OUT: OCT 01, 2014
2013-9. NEW PUBLIC HOUSING TRANSITION	PLAN YEAR APPROVED: 2013 RE-PROPOSED: N/A DESCRIPTION Families transitioning out of a state-aided rental assistance program (25% TTP) to the public housing program (30% TTP) receive a transition period during which the families pay more than 25 percent but less than 30 percent of adjusted household income toward the rent portion before moving to 30 percent at the end of the transition period. REASON(S) CLOSED OUT The flexibility requested under this initiative will not be required.	IMPLEMENTATION DATE: N/A DATE CLOSED OUT: SEP 30, 2013
2013-5. HOMELESS VETERAN PROJECT- BASED SUBSIDY PROGRAM	PLAN YEAR APPROVED: 2013 RE-PROPOSED: N/A DESCRIPTION Creates a local, non-traditional project-based subsidy pilot program to provide housing to veterans who are either not yet ready to enter a more regulated program or who temporarily exit a program. SDHC partners with Veteran's Village of San Diego for this activity. REASON(S) CLOSED OUT Veteran's Village of San Diego determined the activity as neither economically advantageous nor viable under current circumstances and requested permission to close out the activity.	IMPLEMENTATION DATE: N/A DATE CLOSED OUT: SEP 30, 2013
2013-3. ELIMINATION OF 100% EXCLUDED INCOME FROM THE INCOME VERIFICATION PROCESS	PLAN YEAR APPROVED: 2013 RE-PROPOSED: N/A DESCRIPTION Removes the requirement to verify and enter excluded income into the rent calculation formula and subsequently on the HUD 50058. REASON(S) CLOSED OUT Activity had originally been reactivated due to the expiration of PIH Notice 2013-03. A Final Rule FR 5743-F-03 was published, reactivating the streamlining measure.	IMPLEMENT DATE: SEP 01, 2012 DATE CLOSED OUT: JULY 01, 2020



CLOSED OUT ACTIVITIES

2012-4. PROJECT-BASED SUBSIDY PROGRAM FOR THE HOMELESS	<p>PLAN YEAR APPROVED: 2012</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION Using Broader Uses of Funds Authority, SDHC created a program which provides a flat subsidy based on the number of authorized units in the development; all program administration is performed by the development owner with monitoring and auditing performed by SDHC.</p> <p>REASON(S) CLOSED OUT SDHC determined the program structure as not advantageous to the agency's approach to ending homelessness on the City of San Diego. Efforts are focused in other development capacities.</p>	<p>IMPLEMENTATION DATE: N/A</p> <p>DATE CLOSED OUT: DEC 31, 2014</p>
2011-10. BROADER USES OF FUNDS FOR IDAS	<p>PLAN YEAR APPROVED: 2011</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION SDHC received permission to utilize MTW broader use of funds authority to subsidize IDAs not authorized by federal regulations.</p> <p>REASON(S) CLOSED OUT The activity is a Section 8 activity not requiring regulatory waivers or broader uses of funds authority, but rather single-fund flexibility. The activity is no longer active.</p>	<p>IMPLEMENTATION DATE: JUL 01, 2010</p> <p>DATE CLOSED OUT: JUN 30, 2011</p>
2011-9. ENHANCE FAMILY SELF-SUFFICIENCY PROGRAM	<p>PLAN YEAR: 2011</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION In the event the head of household is unable to enroll in the FSS program (such as due to a disability), an adult household member may enroll in the program as the sole participant.</p> <p>REASON(S) CLOSED OUT Per HUD's recommendation, the initiative will be combined with the FSS Reinvention activity via a re-proposal in the Fiscal Year 2015 MTW Annual Plan.</p>	<p>IMPLEMENTATION DATE: OCT 01, 2010</p> <p>DATE CLOSED OUT: JUL 01, 2014</p>
2011-5. DISREGARD RETIREMENT ACCOUNTS	<p>PLAN YEAR: 2011</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION SDHC disregards retirement accounts when verifying an applicant or participant's assets.</p> <p>REASON(S) CLOSED OUT The re-proposal of activity 2010-6 wherein assets are eliminated from the rent calculation eliminates the need for the activity.</p>	<p>IMPLEMENTATION DATE: AUG 01, 2010</p> <p>DATE CLOSED OUT: JUN 30, 2015</p>
2010-10. UNDERTAKE PUBLIC HOUSING DEVELOPMENT	<p>PLAN YEAR: 2010</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION/UPDATE Acquire, rehabilitate, or produce housing units as public housing.</p> <p>REASON(S) CLOSED OUT This activity was closed out in the Fiscal Year 2011 MTW Report. Public Housing development will occur under the Fiscal Year 2011 Public Housing Development initiative which combines the authorizations and flexibilities.</p>	<p>IMPLEMENTATION DATE: JUL 01, 2010</p> <p>DATE CLOSED OUT: JUN 30, 2011</p>
2010-3. TRIENNIAL REEXAMINATIONS FOR ELDERLY AND DISABLED HOUSEHOLDS	<p>PLAN YEAR: 2010</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION/UPDATE Allows families defined as Elderly/Disabled to participate in a Triennial Reexamination Cycle. COLA updates to social security and veteran's benefits are processed in the "off" years. The activity was implemented using the authority to redefine the cycle utilized for the full reexamination of income and household composition.</p> <p>REASON(S) CLOSED OUT SDHC closed out the activity to streamline the reexamination process for Path to Success participants and rental assistance staff. Multiple reexamination processes for households proved difficult to administer when population changes occurred between Work-Able and Elderly/Disabled households. Path to Success households are placed on a biennial reexamination process effective with July 2015 reexamination. The PBV and FUP programs remain on an annual reexamination cycle.</p>	<p>IMPLEMENTATION DATE: OCT 01, 2009</p> <p>DATE CLOSED OUT: JUL 01, 2015</p>



CLOSED OUT ACTIVITIES

2009-1. ACHIEVEMENT ACADEMY OF THE SAN DIEGO HOUSING COMMISSION	<p>PLAN YEAR: 2009</p> <p>RE-PROPOSED: N/A</p> <p>DESCRIPTION/UPDATE The SDHC Achievement Academy, formerly known as the Economic Development Academy, offers a broad range of one-on-one services and workshops geared toward workforce preparation, financial literacy, and homeownership education.</p> <p>REASON(S) CLOSED OUT The activity is a Section 8 activity not requiring regulatory waivers or broader uses of funds authority. The activity is ongoing but reported as a single fund flexibility activity in Section 5 of the Plan</p>
	<p>IMPLEMENTATION DATE: OCT 01, 2010</p> <p>DATE CLOSED OUT: JUN 30, 2011</p>



SECTION V – SOURCES AND USES OF MTW FUNDS

ESTIMATED SOURCES AND USES OF MTW FUNDS

I. ESTIMATED SOURCES OF MTW FUNDS

The MTW PHA shall provide the estimated sources and amount of MTW funding by Financial Data Schedule (FDS) line item.

SOURCES		
FDS LINE ITEM	FDS LINE ITEM NAME	DOLLAR AMOUNT
70500 (70300+70400)	TOTAL TENANT REVENUE	\$0
70600	HUD PHA OPERATING GRANTS	\$278,280,955
70610	CAPITAL GRANTS	\$0
70700 (70710+70720+70730+70740+70750)	TOTAL FEE REVENUE	\$0
71100+72000	INTEREST INCOME	\$0
71600	GAIN OR LOSS ON SALE OF CAPITAL ASSETS	\$0
71200+71300+71310+71400+71500	OTHER INCOME	\$4,371,000
70000	TOTAL REVENUE	\$282,651,955*

II. ESTIMATED USES OF MTW FUNDS

The MTW PHA shall provide the estimated uses and amount of MTW funding by Financial Data Schedule (FDS) line item.

SOURCES		
FDS LINE ITEM	FDS LINE ITEM	DOLLAR AMOUNT
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	TOTAL OPERATING - ADMINISTRATIVE	\$11,472,658
91300+91310+92000	MANAGEMENT FEE EXPENSE	\$0
91810	ALLOCATED OVERHEAD	\$9,316,767
92500 (92100+92200+92300+92400)	TOTAL TENANT SERVICES	\$1,603,975
93000 (93100+93600+93200+93300+93400+93800)	TOTAL UTILITIES	\$0
93500+93700	LABOR	\$0
94000 (94100+94200+94300+94500)	TOTAL ORDINARY MAINTENANCE	\$0
95000 (95100+95200+95300+95500)	TOTAL PROTECTIVE SERVICES	\$0
96100 (96110+96120+96130+96140)	TOTAL INSURANCE PREMIUMS	\$340,525
96000 (96200+96210+96300+96400+96500+96600+96800)	TOTAL OTHER GENERAL EXPENSES	\$50,517,749
96700 (96710+96720+96730)	TOTAL INTEREST EXPENSE AND AMORTIZATION COST	\$0
97100+97200	TOTAL EXTRAORDINARY MAINTENANCE	\$0
97300+97350	HOUSING ASSISTANCE PAYMENTS + HAP PORTABILITY-IN	\$209,400,281
97400	DEPRECIATION EXPENSE	\$0
97500+97600+97700+97800	ALL OTHER EXPENSES	\$0
90000	TOTAL EXPENSES	\$282,651,955*

* FY 2024 estimated numbers are not expected to be finalized until March 2023. Figures from the FY 2023 plan are being included as a placeholder.

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

III. DESCRIPTION OF PLANNED USE OF MTW SINGLE FUND FLEXIBILITY

SDHC utilizes single-fund flexibility to fund the Achievement Academy and to provide funding for services in support of the Community Action Plan on Homelessness and the SDHC Housing Intervention Continua. The Achievement Academy is a learning and skills center available to families participating in the Housing Choice Voucher and Public Housing programs. Programs offered at the Achievement Academy are geared to workforce readiness and financial literacy. The Family Self-Sufficiency program is another component of the Achievement Academy. Please note: Individual Development Accounts are no longer funded with MTW single-fund flexibility. Please see the following pages for a thorough discussion of each activity.



SINGLE FUND FLEXIBILITY NARRATIVE

ENVISION CENTER DEMONSTRATION PROGRAM

In June of 2018, HUD announced the designation of EnVision Centers in 17 communities across the nation. SDHC was selected for the only location in California, and only one of three co-located within a designated Promise Zone.

Initially implemented with two locations to provide client flexibility, the Southeast San Diego location closed due to the pandemic. The location housed at the SDHC's Achievement Academy is temporarily closed to in-person traffic while staff continues to work remotely. Services, however, continue to be offered online. EnVision Centers are open to any households currently receiving SDHC's rental assistance and also those on the waitlist. Other clients served include residents of the Promise Zone.

EnVision Centers leverage public and private resources to help clients achieve goals to secure economic security. To foster long-lasting self-sufficiency, EnVision Centers provide support in the following four areas of focus: Economic Empowerment; Education; Health/Wellness; and Character/Leadership.

FAMILY SELF-SUFFICIENCY: EDEN HOUSING INC.

In November 2020, the SDHC Achievement Academy signed a contract with Eden Housing, Inc., a California nonprofit public benefit corporation, to implement a Family Self-Sufficiency (FSS) program at two of its San Diego properties. This marks the first time HUD has authorized a public housing authority to run an FSS program for a private multifamily developer. The FSS program will operate under HUD's guidelines for the traditional five-year program and not the Achievement Academy's MTW approved two-year program.

ACHIEVEMENT ACADEMY

SDHC uses single-fund flexibility in support of MTW activities to enhance self-sufficiency programming. SDHC combines funds from public housing operating and capital fund assistance (authorized by section 9 of the United States Housing Act of 1937 [the Act]) and voucher funds (authorized by section 8 (o) of the Act) to implement a block grant/single-fund budget approach to budgeting and accounting. SDHC has consolidated public housing and HCV program funds to implement the approved Moving to Work initiatives described in previously approved MTW Plans and will continue to do so in future Plans.

SDHC uses single-fund flexibility to conduct a variety of activities geared toward self-sufficiency. The Achievement Academy offers a broad range of one-on-one services and workshops geared toward workforce readiness and financial literacy. Partnerships with a variety of external organizations specializing in their fields enable SDHC to provide assistance to participants with different interests, career focuses, and skill levels. Leveraging funding from outside sources increases the services provided to participants. When possible, staff looks for grants that provide funding and coaching to assist both staff and participants. Following the Financial Opportunity Center (FOC) model, created by funding from the Local Initiatives Support Corporation (LISC), the Achievement Academy is able to provide robust services to participants that go beyond job leads and help support self-sufficiency. The resources offered at the Achievement Academy are a vital component of the Path to Success rent reform activity as participants are incentivized to increase income and work towards self-sufficiency. SDHC plans to continue and grow these partnerships to better serve our families and increase economic self-reliance. The narrative below describes some of the services offered at the Achievement Academy.

It is worth noting that while the COVID-19 pandemic temporarily disrupted and altered the Achievement Academy's service delivery model, it did not prevent services from reaching clients in new and creative ways. Like most businesses across the country and elsewhere, SDHC Achievement Academy staff quickly reworked in-person meetings and workshops to Zoom or other online platforms. The change in service delivery proved to be more accessible and convenient for many clients resulting in increased participation in workshops and programmatic events.



EMPLOYMENT/WORKFORCE DEVELOPMENT

JOB DEVELOPER

One of the Achievement Academy Workforce Readiness Specialist (WRS) positions serves as a job developer and makes connections with employers of in-demand occupations; organizes job fairs; and coordinates employment services with partner organizations. Training for participants covers such topics as on-line job search, résumé writing, interviewing tips, and customer service. The Achievement Academy also partners with Manpower, an industry leader in employment services. Manpower helps to leverage connections in the business community to help open doors to companies that typically have been a struggle for participants to get into in the past.

ONE-STOP CAREER CENTER

The San Diego Workforce Partnership (SDWP) provides services via a satellite One-Stop Career Center at the local downtown public library. SDWP staff offers workforce development services including labor market information, career development, assessment, job search/retention skills, job placement assistance, and referrals to training opportunities.

SMALL BUSINESS DEVELOPMENT TRAINING

The SDHC Achievement Academy partners with Access to support entrepreneurs who want to start or expand a small business. Microenterprise services and training offered to clients include creating, or expanding, a business plan; obtaining a business license; one-on-one business counseling; market training & research; and financial literacy support among other services.

EMPLOYMENT/WORKFORCE DEVELOPMENT WORKSHOPS

The SDHC Achievement Academy offers employment readiness workshops and provides access to temporary and permanent employment through employer connections. Workshops include: Returning to the Workforce; The Job Search Rollercoaster; Teamwork Skills Everyone Needs; and 10 Keys for Professional Success among others. The Achievement Academy also hosts recruitment fairs via Zoom. Participants are invited to presentations from hiring organizations and hear directly from human resources representatives how to get hired at their company. Topics covered range from the job application and résumé submittal process to interview preparedness and communication skills. Many of the participating recruitment organizations guarantee, at minimum, an interview to SDHC clients.

YOUTH PROGRAMS

Staff at the Achievement Academy strives to offer innovative programming in an effort to keep participants interested and engaged. One WRS position focuses on developing programming for “opportunity youth”, defined as young adults between sixteen and twenty-four years of age who are not working and not enrolled in school. Students receive education counseling or career guidance. The Achievement Academy has partnered with Access, Inc. to provide additional training and services to these young adults.

ACADEMY COMPUTER LAB

The SDHC Achievement Academy computer lab is currently closed to in-person activity as staff continues to work remotely. During the early shutdown of the pandemic SDHC partnered with Computers2Kids to provide laptops to assist with digital access to SDHC families. This partnership, made possible with a grant from the Local Initiatives Support Corporation (LISC), allows families to participate in on-line school and job search activities. Currently, families are referred to local libraries where free Wi-Fi devices and equipment may be checked out. .

INCOME SUPPORTS

BENEFITS SCREENING

SDHC Achievement Academy staff work with clients on benefits screening. Application assistance is currently offered for an array of program such as CalWorks, Women Infants and Children (WIC), California Healthy Families, Child Care Assistance, MediCal, and

SECTION IV – APPROVED MTW ACTIVITIES: HUD APPROVAL PREVIOUSLY GRANTED



Supplemental Nutrition Assistance Program (SNAP). Additionally, clients are referred to Dreams for Change for tax assistance programs.

FINANCIAL EDUCATION

FINANCIAL COUNSELING

The Achievement Academy has been able to have several WRS positions trained as certified Financial Counselors. The Financial Counselors offer credit counseling in debt reduction, credit repair, budgeting, and cash management skills. These services have been incorporated into the FOC service delivery model utilized within the Achievement Academy.

FINANCIAL SKILLS EDUCATION WORKSHOPS

Financial Education workshops are routinely offered in the following topic areas: Debt and credit repair; credit score improvement; controlling expenses; maintaining a financial fitness plan; electronic banking and direct employee deposits; budget management, ordering, reviewing, and repairing credit report; investments strategies and options; and pensions/retirement planning.

FINANCIAL COACHING TRAINING

SDHC WRS staff utilize the LISC Financial Counseling Model to implement innovative coaching methods during one-on-one appointments with participants. SDHC is also positioned to assist participants with improving credit through a partnership with Credit Builders Alliance. The ability to internally pull credit reports allows SDHC to further assist participants with accessing current credit ratings in order to begin aligning client goals for credit improvement to future financial and career goals.

The chart below contains a summary of the results of Achievement Academy activities at the close of Fiscal Year 2022.

ACHIEVEMENT ACADEMY			
METRIC	BASELINE	OUTCOME	BENCHMARK ACHIEVED?
Number of rental assistance participants receiving core services	982	1188	Yes
Number of rental assistance participants with an increase in earnings	229	254	Yes
Number of rental assistance participants placed in employment	144	195	Yes
Number of rental assistance participants employed for 12 or more consecutive months	44	92	Yes
Number of rental assistance participants who attended a work readiness workshop	727	984	Yes
Percent of rental assistance participants who attended a recruitment and resource fair and obtained employment as a direct result	0%	0%	Yes
Number of rental assistance participants who completed vocational or bridge training	0	5	Yes

FLEXIBLE FUNDING FOR SUPPORTIVE SERVICES

In addition to the Achievement Academy, SDHC utilizes MTW funds to provide supportive services that would align with the City of San Diego's Community Action Plan on Homelessness. The Community Action Plan on Homelessness identified a homeless-crisis-response-system service gap. Households can often present in significant crisis, and in the early stage of the crisis presentation it can be challenging to determine whether the homelessness/housing crisis is due to situational or structural factors/barriers in the



household/individual. Flexible funding used towards supportive services, in this instance, help fund a central point of contact and centralized resources for households as they move between the various programs available.

Examples of supportive services that SDHC seeks to provide via flexible funding include, but are not limited to:

- Centralized Case Management
- Mental Health Services
- Physical Healthcare Services
- Behavioral Healthcare
- Substance Use Services
- Life Skills Training
- Education Services
- Employment Assistance
- HIV Services

This flexible supportive services approach creates individualized emergency intervention and housing planning for the household/individual to best meet the participant's needs with a focus on aligning the right level of intervention with the critical need, promoting self-sufficiency and identifying the best resource to help participants thrive and overcome both situational and structural barriers to long-term housing stability.

For example, SDHC has drafted a Housing Intervention Continua, which delves into how at-risk populations can be served via centralized resources if funded via this proposed activity. The Continua contains multiple approved local non-traditional MTW activities, in which case management is operated separately. Currently, if a household moves from one program to another, this could necessitate a change in who their point of contact is. This continua could utilize flexible funding to focus on using centralized case management in order to help households more successfully navigate available programs, which includes Homeless Shelter Beds, Prevention and Diversion Programs, Moving Home, Sponsor-Based Subsidies, as well as the Achievement Academy and other approved programs. In this instance, centralized case management would remain with participating household from the beginning and continue with them in order to direct which program is most appropriate for their situation. Flexible funding would ensure that even if the household move into another housing program, their case management point of contact would remain with them until exit.

While funding for supportive services within the aforementioned Homeless Housing Continua could be an immediate use of the activity, it is expected that flexible funding for supportive services could also be used towards other households and programs eligible for assistance from SDHC. In addition, funding may be utilized to support administrative staff whose main job duties are to develop, monitor, or support efforts that align with this initiative and SDHC's commitment to further progress towards goals of the Community Action Plan on Homelessness for the City of San Diego. Another potential application SDHC recently encountered occurred during an acquisition using CARES Act funding. While funding was available for the acquisition, the supportive services that were needed were not included. This, if approved, could be used to bridge similar gaps encountered in the acquisition and development process based on other funding sources used.

Another example could be providing assistance to households in obtaining broadband access that is increasingly necessary for education and remote work opportunities, this could include flexible funding for tenant-based households or the use of funds to provide high speed internet access at SDHC-owned and/or controlled properties. As a result of the COVID-19 pandemic, in the City of San Diego, there has been an expansion of remote learning opportunities that may persist for educational outreach after a return to in person classes. Remote learning and conferencing often requires video capabilities, which means that broadband access is required. Not all households have access to this resource, and flexible funding could help provide for households in need in order to prevent a long-term disadvantage. In addition, families with children that would have access would also help their parents or guardians in additional access to job search resources, as well as provide them the ability to work possibly work remotely.

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Flexible funding would help to fund case management staff and financial assistance to stabilize a household's immediate housing crisis. Coupled with financial assistance to address immediate needs, case management helps to minimize the negative impact of unstable housing for individuals and families who are at risk of or actively experiencing homelessness. Prevention and Diversion assistance is individualized to each household's unique needs and stabilization activities may include:

- Short-term, light-touch case management
- Housing search assistance
- Financial literacy resources
- Workforce readiness resources
- Landlord/roommate conflict mediation
- Connection to services and/or public assistance benefits

PREVENTION/DIVERSION

SDHC will utilize MTW flexible funds to provide services that reduce the inflow into the current homelessness system through prevention and diversion. Prevention and Diversion services strive to prevent homelessness before it occurs as well as to divert individuals who are experiencing homelessness to other housing opportunities outside of the region's homeless crisis response system. Prevention and Diversion is aligned with the Housing First model of addressing homelessness, an approach to successfully connect households at risk of or experiencing homelessness to services, programs, and housing options without preconditions and barriers to entry. Preventing or shortening an episode of homelessness for individuals and families greatly reduces the likelihood of another occurrence of housing instability or progression to chronic homelessness. Further, these efforts also help minimize the impact for overburdened shelter systems in San Diego. In addition to supportive services through case management, Prevention and Diversion utilizes financial assistance in the form of rent, rent arrears, utility payments, security deposits and application fees to stabilize housing for individuals and families facing a housing crisis. Depending on the nature of the housing crisis being addressed through our Prevention and Diversion programs, SDHC may choose to use habitability checks in lieu of HQS inspections.

LANDLORD ENGAGEMENT AND ASSISTANCE PROGRAM (LEAP)

SDHC will utilize MTW flexible funds to the Landlord Engagement and Assistance Program or LEAP, which aims to increase access to the existing market of available units for individuals and families experiencing homelessness. LEAP is aligned with the Housing First model of addressing homelessness, an approach to successfully connect households experiencing homelessness to services, programs, and housing options without preconditions and barriers to entry. Depending on the nature of the housing crisis being addressed, SDHC may choose to use habitability checks in lieu of HQS inspections.

LEAP works directly with landlords and property management companies within the City of San Diego to help move individuals and families into housing quickly. LEAP offers incentives to landlords as well as the Landlord Contingency Fund and landlord liaison services. Flexible funding used towards LEAP services would help to fund a SDHC staff landlord liaison, support to individuals and families to identify housing units and financial assistance for them to pay move-in costs like security deposits including holding fees, application fees, utility assistance, rent arrears and vacancy loss.



IV. PLANNED APPLICATION OF PHA UNSPENT OPERATING FUND AND HCV FUNDING

ORIGINAL FUNDING SOURCE	BEGINNING OF FY – UNSPENT BALANCES	PLANNED APPLICATION OF PHA UNSPENT FUNDS DURING FY
HCV HAP*	\$62,690,606	\$62,690,606
HCV Admin Fee	\$0	\$0
PH Operating Subsidy	\$1,223,721	\$1,223,721
TOTAL:	\$63,914,327	\$63,914,327

Description of Planned Expenditures of Unspent Operating Fund and HCV Funding:

SDHC anticipates HCV HAP unspent balance will be used to cover increased voucher cost due to utilization rate being greater than 100%; to cover program administration cost; to fund the acquisition, preservation, and renovation of affordable housing units in the City of San Diego.

Public Housing unspent fund balances are operating and replacement reserves related to SDHC regulatory agreement with the Dept. of Housing and Community Development, a public agency of the State of California.

* Unspent HAP funding should not include amounts recognized as Special Purpose Voucher reserves

**HUD's approval of the MTW Plan does not extend to a PHA's planned usage of unspent funds amount entered as an agency's operating reserve. Such recording is to ensure agencies are actively monitoring unspent funding levels and usage(s) to ensure successful outcomes as per the short- and long-term goals detailed in the Plan

LOCAL ASSET MANAGEMENT PLAN

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

Yes

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

No

Did the MTW PHA provide a LAMP in the appendix?

No

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.

SDHC did not operate a Local Asset Management Plan during Fiscal Year 2022.



RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION

DESCRIPTION OF RAD PARTICIPATION

The MTW PHA shall provide a brief description of its participation in RAD. This description must include the proposed and/or planned number of units to be converted under RAD, under which component the conversion(s) will occur, and approximate timing of major milestones. The MTW PHA should also give the planned/actual submission dates of all RAD Significant Amendments. Dates of any approved RAD Significant Amendments should also be provided.

Rental Assistance Demonstration (RAD) Participation Description:

N/A

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

N/A

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

N/A



SECTION VI – ADMINISTRATIVE

A. BOARD RESOLUTION AND CERTIFICATIONS OF COMPLIANCE

See Appendix A

B. DOCUMENTATION AND PUBLIC PROCESS

See Appendix B

C. PLANNED OR ONGOING EVALUATIONS

There are no planned or ongoing evaluations

D. LOBBYING DISCLOSURES

See Appendix C



APPENDIX A: BOARD RESOLUTION AND CERTIFICATIONS OF COMPLIANCE

BOARD RESOLUTION

PAGE 1 OF 3



BOARD RESOLUTION

PAGE 2 OF 3



BOARD RESOLUTION

PAGE 3 OF 3



CERTIFICATIONS OF COMPLIANCE
(PAGE 1 OF 2)



CERTIFICATIONS OF COMPLIANCE
(PAGE 2 OF 2)



APPENDIX B: DOCUMENTATION AND PUBLIC PROCESS

PUBLIC NOTICE: SAN DIEGO UNION-TRIBUNE



PUBLIC NOTICE – EL LATINO



PUBLIC NOTICE – SAN DIEGO VOICE & VIEWPOINT



PUBLIC HEARING SIGN-IN SHEET



PUBLIC COMMENT MATRIX

APPENDIX C: LOBBYING DISCLOSURES

DocuSign Envelope ID: 6A7C78E0-CD87-4DE2-A11B-9BD543888E49

DISCLOSURE OF LOBBYING ACTIVITIES

OMB Control Number: 4040-0013

Expiration Date: 2/28/2025

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

1. * Type of Federal Action: <input checked="" type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. * Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. * Report Type: <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
---	--	--

4. Name and Address of Reporting Entity:

☒ Prime ☐ SubAwardee

* Name: San Diego Housing Commission

* Street 1: 1122 Broadway, Ste. 300 Street 2: _____

* City: San Diego State: CA: California Zip: 92101

Congressional District, if known: CA-52

5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:

6. * Federal Department/Agency: U.S. Department of Housing and Urban Dev	7. * Federal Program Name/Description: Fiscal Year 2024 Moving to Work (MTW) Block Grant CFDA Number, if applicable: _____
--	---

8. Federal Action Number, if known: _____	9. Award Amount, if known: \$ 278,822,115.03
---	--

10. a. Name and Address of Lobbying Registrant:

Prefix: _____ * First Name: N/A Middle Name: _____

* Last Name: N/A Suffix: _____

* Street 1: _____ Street 2: _____

* City: _____ State: _____ Zip: _____

b. Individual Performing Services (including address if different from No. 10a)

Prefix: _____ * First Name: N/A Middle Name: _____

* Last Name: N/A Suffix: _____

* Street 1: _____ Street 2: _____

* City: _____ State: _____ Zip: _____

11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

*** Signature:** Jeff Davis

*** Name:** Prefix: _____ * First Name: Jeff Middle Name: _____

* Last Name: Davis Suffix: _____

Title: Interim President & Chief Executive Officer **Telephone No.:** _____ **Date:** 12/13/2022



APPENDIX D: NON-MTW RELATED SDHC INFORMATION

HOMEOWNERSHIP OPPORTUNITIES FOR PEOPLE OF COLOR

An expanded, collaborative effort to help more people of color in the San Diego region become homeowners was announced at a September 21, 2022, news conference about a \$7.5 million grant the Wells Fargo Foundation awarded to SDHC, part of the San Diego Homeownership Equity Collaborative.

This grant will support strategies to create 5,000 new homeowners of color in San Diego County by the end of 2025. The strategies include:

- **Preparation:** Preparing a pipeline of eligible buyers of color by expanding programs such as debt reduction, credit repair, credit counseling and homeownership navigation.
- **Products:** Expanding the availability of down payment assistance and low-cost mortgage programs.
- **Partners:** Expanding connections to trained and qualified professionals.
- **Policy:** And expanding research, incentives and policy reforms to increase the housing supply in San Diego.

The San Diego City-County Reinvestment Task Force (RTF) is leading the implementation of the San Diego Homeownership Equity Collaborative's strategies throughout the San Diego region. SDHC and RTF are among the organizations on the San Diego Homeownership Equity Collaborative's Executive Committee.

According to an [Urban Institute study](#) that SDHC commissioned, Latino households represented 19.1 percent of all households in San Diego, but only 13.6 percent of all homeowner households. Black households accounted for 6.1 percent of all San Diego households, but only 3.6 percent of all homeowner households in the City of San Diego.

Homeownership provides households an asset that grows in value, can help pay educational expenses, may be used to help family members buy their own homes, or provides an inheritance for the next generation.

Wells Fargo is working to increase racial equity in homeownership. Nationally, WORTH aims to help create 40,000 new homeowners of color by the end of 2025.



Wealth Opportunities Restored through Homeownership (WORTH) Grant
News Conference
September 21, 2022



COVID-19 HOUSING STABILITY ASSISTANCE PROGRAM

At a time when having a stable place to call home was especially important due to the COVID-19 pandemic, the COVID-19 Housing Stability Assistance Program (HSAP) allayed the concerns of thousands of households in the City of San Diego with low income who found themselves behind on their rent and/or utilities due to or during the pandemic.

Operated and administered by SDHC, HSAP payments totaled more than \$218 million to help more than 18,300 households with low income pay their rent, utilities and other housing-related costs. HSAP essentially concluded as of August 31, 2022. At the program's conclusion, all households that qualified for assistance had received it.

Government, the business community, labor organizations and a variety of community-based organizations came together through extensive collaboration to support this program as a vital resource. For many, this program made the difference between staying in their home and experiencing homelessness.

Federal funding awarded directly to the City of San Diego or through the State of California, as well as State funding, made this program possible. SDHC successfully disbursed funds to assist qualifying households in need as other jurisdictions across the country experienced challenges timely expending federal emergency rent relief funds.

Raising awareness about the program and helping households complete applications and submit documents also required the participation of many diverse community groups. These included 2-1-1 San Diego and community-based organizations with which SDHC contracted to help applicants. Assistance was provided in 20 languages.



Eric, HSAP participant



Laura, HSAP participant

HOUSING INSTABILITY PREVENTION PROGRAM

SDHC launched the Housing Instability Prevention Program (HIPP) in September 2022 to help pay rent and other housing-related expenses for families in the City of San Diego with low income and unstable housing situations, such as those that are facing eviction for nonpayment of rent.

With limited funding, the program can assist approximately 300 households. SDHC identifies potential participants from referrals from 2-1-1 San Diego. Housing Specialists will contact those households to confirm and verify if they qualify for help.

The program pays \$500 per month for up to 24 months for qualifying households in the City of San Diego and helps with housing-related expenses such as security deposits, past-due rent, utilities, application fees or furniture, depending on the family's need. Payments are made directly to the approved vendor, such as the landlord or utility company.

The San Diego City Council on June 13, 2022, approved including \$3,570,000 in the Fiscal Year 2023 budget to fund HIPP as a pilot program.



EMERGENCY HOUSING VOUCHERS

SDHC helped eligible families lease rental homes with new federal Emergency Housing Vouchers more quickly than many other jurisdictions in California and nationwide, achieving a 100 percent lease-up of its allocation of the federal housing vouchers.

SDHC's success in awarding and leasing up these vouchers was featured on a news story published on October 14, 2022, in the Los Angeles Times titled, "[How San Diego achieved surprising success housing homeless people](#)."

Emergency Housing Vouchers help pay rent for people who are experiencing homelessness; are at risk of experiencing homelessness; are fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, or human trafficking; or who recently experienced homelessness and for whom rental assistance will help prevent their homelessness or a high risk of housing instability.

The federal American Rescue Plan Act authorized 70,000 Emergency Housing Vouchers nationwide, of which 480 were awarded to SDHC.

SDHC entered into Memoranda of Understanding (MOU) with the San Diego Regional Continuum of Care and four additional organizations to directly refer households to SDHC for these vouchers. In addition, SDHC collaborates with 17 community service providers for initial and ongoing case management and additional needs-based services for Emergency Housing Voucher households to increase eligibility and lease-up success, as well as facilitate ongoing housing stability.

SDHC also hired full-time staff to serve as housing specialists/navigators in SDHC's Landlord Engagement and Assistance Program (LEAP). These staff members were specifically assigned to Emergency Housing Voucher families, facilitating landlord incentives, housing search services, service provider coordination and rental assistance staff communication.



Jessica and her family, Emergency Housing Voucher participants

NAHRO CONFERENCE IN SAN DIEGO

SDHC was honored to serve as the host agency for the National Association of Housing and Redevelopment Officials (NAHRO) annual conference, held September 22-24, 2022, with the theme "NAHRO Together: Advancing Our Communities."

SDHC's Interim President & CEO Jeff Davis joined San Diego Mayor Todd Gloria, SDHC Chair of the Board of Commissioners Eugene "Mitch" Mitchell, NAHRO President Patricia Wells and NAHRO Chief Executive Officer Mark Thiele at the opening session to welcome attendees to San Diego.

Sessions at the conference included two SDHC presentations: "Successful Strategies for Creating Affordable Housing in a Competitive, High-Cost Market," which also included Wakeland Housing and Development Corporation and People Assisting the

APPENDIX D: NON-MTW RELATED SDHC INFORMATION



Homeless (PATH) San Diego, and “Moving the Needle on Homelessness: The Power of Community,” which included leaders from SDHC’s Homeless Housing Innovations Division and the San Diego Regional Task Force on Homelessness.

SDHC also led a group of conference attendees on a tour of several affordable rental housing developments on which SDHC collaborated with developers and service providers. These properties included projects with permanent supportive housing for people who experienced homelessness.

NAHRO also recognized SDHC with three Awards of Merit at the conference:

- **Affordable Housing: San Diego Housing Commission Accessory Dwelling Unit Development Pilot Program** – Working with its nonprofit affiliate Housing Development Partners (HDP), SDHC built five ADUs in the available yard space of five single-family homes SDHC owns and rents as affordable housing in the City of San Diego. SDHC also detailed key takeaways and lessons learned from this process to provide important information to help San Diego homeowners interested in building ADUs on their properties.
- **Community Revitalization: City of San Diego COVID-19 Housing Stability Assistance Program** – SDHC launched this program to help pay rent and utilities for qualifying households with low income who experienced financial hardship due to or during the pandemic.
- **Administrative Innovation: Online Dashboards for Homelessness Programs and Affordable Housing** – SDHC created these new online dashboards to provide the public and policymakers with important data about affordable housing and homelessness programs in the City of San Diego.



NAHRO Awards of Merit Presented to SDHC



APPENDIX E: CURRENT ALTERNATIVE REASONABLE COST LIMITS

SUPPORTING DOCUMENTATION: ACTIVITY #2021-1

Project References								
PROPERTY NAME	BUILDING	TYPE	HCC (\$)	TDC (\$)	Gross SF	\$/SF HCC	\$/SF TDC	BOARD REPORT
Elevator								
ALPHA LOFTS	ELEVATOR	NEW	\$ 10,020,106	\$ 16,689,662	38,566	\$ 259.82	\$ 432.76	HCR17-010
STELLA	ELEVATOR	NEW	\$ 17,862,896	\$ 25,954,448	59,003	\$ 302.75	\$ 439.88	HCR17-093
ZEPHYR GRANTVILLE VETERANS APARTMENTS	ELEVATOR	REHAB	\$ 9,159,000	\$ 25,665,500	50,960	\$ 179.73	\$ 503.64	HCR17-014
ENCANTO VILLAGE	ELEVATOR	NEW	\$ 14,138,561	\$ 21,888,404	65,400	\$ 216.19	\$ 334.69	HCR17-020
PARK & MARKET	ELEVATOR	NEW	\$174,551,726	\$ 225,494,043	471,444	\$ 370.25	\$ 478.31	HCR17-039
THE BEACON	ELEVATOR	NEW	\$ 10,142,953	\$ 16,735,881	26,166	\$ 387.64	\$ 639.60	HCR17-050
CIVITA II FAMILY	ELEVATOR	NEW	\$ 72,257,767	\$ 99,339,048	185,390	\$ 389.76	\$ 535.84	HAR17-036
LUTHER TOWER	ELEVATOR	REHAB	\$ 11,032,169	\$ 26,172,310	98,000	\$ 112.57	\$ 267.06	HCR17-078
BLUEWATER	ELEVATOR	NEW	\$ 19,870,000	\$ 28,809,500	90,944	\$ 218.49	\$ 316.78	HCR17-083
SAN YSIDRO SENIOR VILLAGE	ELEVATOR	NEW	\$ 8,359,403	\$ 15,399,132	29,610	\$ 282.32	\$ 520.07	HCR18-018
WEST PARK	ELEVATOR	REHAB	\$ 5,009,730	\$ 13,652,049	12,652	\$ 395.96	\$1,079.04	HCR19-003
JAMBOREE	ELEVATOR	NEW	\$ 16,875,089	\$ 30,030,347	66,947	\$ 252.07	\$ 448.57	HCR19-007
TRINITY APARTMENTS	ELEVATOR	NEW	\$ 18,035,060	\$ 29,003,070	43,978	\$ 410.09	\$ 659.49	HCR19-019
SCRIPPS MESA	ELEVATOR	NEW	\$ 79,000,000	\$106,840,000	374,261	\$ 211.08	\$ 285.47	HCR19-050
QUALITY INN	ELEVATOR	REHAB	\$ 8,263,233	\$ 11,029,876	23,612	\$ 349.96	\$ 467.13	HCR19-053
EAST BLOCK FAMILY	ELEVATOR	NEW	\$ 28,062,466	\$ 36,131,299	103,708	\$ 270.59	\$ 348.39	HCR19-099
EAST BLOCK SENIORS	ELEVATOR	NEW	\$ 23,160,884	\$ 26,992,957	81,942	\$ 282.65	\$ 329.42	HCR19-056
WESLEY TERRACE	ELEVATOR	REHAB	\$ 13,853,827	\$ 29,254,990	110,000	\$ 125.94	\$ 265.95	HCR19-057
ULRIC STREET	ELEVATOR	NEW	\$ 26,037,629	\$ 41,293,511	98,643	\$ 263.96	\$ 418.62	HCR19-070
COURTHOUSE COMMONS	ELEVATOR	NEW	\$178,800,000	\$ 234,670,000	524,917	\$ 340.63	\$ 447.06	HCR19-077
14TH AND COMMERCIAL APARTMENTS	ELEVATOR	NEW	\$ 87,912,636	\$ 134,853,907	237,174	\$ 370.67	\$ 568.59	HCR19-087
14C VHHP	ELEVATOR	NEW	\$ 23,380,949	\$ 35,434,998	53,481	\$ 437.18	\$ 662.57	HCR19-088
KEELER COURT	ELEVATOR	NEW	\$ 20,650,582	\$ 36,170,233	78,939	\$ 261.60	\$ 458.20	HCR19-089
Walkup								
BELLA VISTA	WALKUP	REHAB	\$ 8,770,116	\$ 39,768,420	137,756	\$ 63.66	\$ 288.69	HCR17-017
NEW PALACE HOTEL	WALKUP	REHAB	\$ 7,943,045	\$ 19,040,849	34,563	\$ 229.81	\$ 550.90	HCR17-018
TOWN & COUNTRY APARTMENTS	WALKUP	REHAB	\$ 13,286,361	\$ 43,074,044	147,785	\$ 89.90	\$ 291.46	HAR17-019
VISTA DEL PUENTE	WALKUP	NEW	\$ 13,522,258	\$ 19,677,147	47,794	\$ 282.93	\$ 411.71	HCR17-031
SAN YSIDRO FAMILY APARTMENTS	WALKUP	NEW	\$ 23,882,816	\$ 38,812,315	130,000	\$ 183.71	\$ 298.56	HAR17-034
REGENCY CENTRE APARTMENTS	WALKUP	REHAB	\$ 9,192,744	\$ 25,955,708	81,500	\$ 112.79	\$ 318.47	HAR17-038
CORONADO TERRACE	WALKUP	REHAB	\$ 25,548,297	\$111,579,303	301,428	\$ 84.76	\$ 370.17	HCR17-042
CASA PULETA	WALKUP	REHAB	\$ 1,746,932	\$ 9,391,159	63,226	\$ 27.63	\$ 148.53	HCR17-045
PACIFICA AT PLAYA DEL SOL	WALKUP	NEW	\$ 7,828,483	\$ 14,949,746	48,563	\$ 161.20	\$ 307.84	HCR17-089
HOLLYWOOD PALMS II	WALKUP	REHAB	\$ 8,435,601	\$ 27,990,851	93,413	\$ 90.30	\$ 299.65	HCR17-091
PARKSIDE APARTMENTS	WALKUP	REHAB	\$ 3,106,636	\$ 9,361,632	31,940	\$ 97.26	\$ 293.10	HCR18-052
HILLSIDE VIEWS APARTMENTS	WALKUP	REHAB	\$ 16,736,053	\$ 72,744,661	279,624	\$ 59.85	\$ 260.15	HCR18-083
HARBOR VIEW VILLA APARTMENTS	WALKUP	REHAB	\$ 3,103,340	\$ 12,171,847	58,340	\$ 53.19	\$ 208.64	HCR19-006
IVY APARTMENTS	WALKUP	NEW	\$ 8,309,583	\$ 17,333,831	33,512	\$ 247.96	\$ 517.24	HCR19-017
BENSON APARTMENTS	WALKUP	REHAB	\$ 8,576,357	\$ 22,551,411	26,050	\$ 329.23	\$ 865.70	HCR19-018
MISSION TERRACE APARTMENTS	WALKUP	REHAB	\$ 4,379,505	\$ 18,397,900	103,108	\$ 42.47	\$ 178.43	HCR19-064
MARINER'S VILLAGE	WALKUP	REHAB	\$ 15,013,020	\$ 68,516,724	171,896	\$ 87.34	\$ 398.59	HCR19-090
PARK CREST	WALKUP	REHAB	\$ 5,658,696	\$ 42,542,504	146,222	\$ 38.70	\$ 290.94	HCR19-101
GRANT HEIGHTS / WINONA APARTMENTS	WALKUP	REHAB	\$ 3,160,080	\$ 14,733,294	28,422	\$ 111.18	\$ 518.38	HCR19-103

APPENDIX E: ALTERNATIVE REASONABLE COST LIMITS FOR SAN DIEGO



SUPPORTING DOCUMENTATION: ACTIVITY #2021-1

EFFECTIVE FY 2021

AVERAGE TDC AND HCC		
	AVERAGE TDC PER SQ. FT.	AVERAGE HCC PER SQ. FT.
ELEVATOR	\$474.22	\$290.95
WALKUP	\$358.80	\$125.99

WALKUP COMPARISON

HCC: 131.92 TDC: 411.54		0 BED 500 Sq. Ft.		1 BED 700 Sq. Ft.		2 BED 900 Sq. Ft.		3 BED 1200 Sq. Ft.		4 BED 1500 Sq. Ft.		5 BED 1700 Sq. Ft.		6 BED 1900 Sq. Ft.	
		HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC
HUD	Walkup	81,058	141,852	110,721	193,761	140,175	245,306	184,728	323,274	228,994	400,739	258,078	451,637	286,822	501,938
SDHC	Walkup	62,997	179,399	88,196	251,159	113,395	322,918	151,194	430,557	214,191	538,197	214,191	609,956	239,390	681,716

ELEVATOR COMPARISON

HCC: 287.04 TDC: 515.81		0 BED 500 Sq. Ft.		1 BED 700 Sq. Ft.		2 BED 900 Sq. Ft.		3 BED 1200 Sq. Ft.		4 BED 1500 Sq. Ft.		5 BED 1700 Sq. Ft.		6 BED 1900 Sq. Ft.	
		HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC
HUD	Elevator	91,130	145,807	127,581	204,130	164,033	262,453	218,711	349,938	273,389	437,422	309,841	495,745	346,292	554,068
SDHC	Elevator	145,476	237,112	203,666	331,956	261,856	426,801	349,142	569,068	436,427	711,335	494,618	806,179	552,808	901,024

TDC/HCC TABLE: ACTIVITY #2021-1

SDHC REASONABLE COST LIMITS (APPROVED IN 2021 PLAN)

	0 BED 500 Sq. Ft.		1 BED 700 Sq. Ft.		2 BED 900 Sq. Ft.		3 BED 1200 Sq. Ft.		4 BED 1500 Sq. Ft.		5 BED 1700 Sq. Ft.		6 BED 1900 Sq. Ft.	
	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC	HCC	TDC
Detached/Semi-Detached	106,855	186,997	138,209	241,866	165,349	289,361	197,097	344,919	232,214	406,374	254,508	445,389	275,393	481,938
Row Homes	92,115	161,200	120,236	210,414	145,667	254,917	177,708	310,990	210,753	368,818	231,788	405,630	251,442	440,023
Walkup	62,997	179,399	88,196	251,159	113,395	322,918	151,194	430,557	214,191	538,197	214,191	609,956	239,390	681,716
Elevator	145,476	237,112	203,666	331,956	261,856	426,801	349,142	569,068	436,427	711,335	494,618	806,179	552,808	901,024