



MOVING TO WORK

FY 2016 ANNUAL REPORT



King County
Housing
Authority

KING COUNTY HOUSING AUTHORITY

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PREPARED BY: Katie Escudero

PHOTO CREDIT: William Wright Photography

DESIGNED BY: Christy Batta

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YEAR IN REVIEW

Seattle, King County's largest municipality, is currently the fourth fastest growing city in the nation. The local economy, fueled by a high tech boom, is adding 61,000 jobs a year. Yet this year school districts in King County, a county with a median household income of \$75,000, reported over 8,400 homeless children in their classrooms. Rents in Seattle have climbed by 8.7% over the past twelve months. The extraordinary economic boom that our region is experiencing is leaving far too many of our residents—not just children, but seniors, people with disabilities and workers in low wage jobs—in the rear view mirror. Many of our neighbors are barely making their rent payments, and a growing number are showing up living on our streets.

The failure of the private housing market to provide affordable solutions for the needs of our community has significant long-term consequences. Children who are homeless do not succeed in school and will be challenged in finding a place in our region's workforce. As a result, they will contribute less to the economy over the long term. A lack of affordable, stable housing for medically vulnerable seniors and individuals living with disabilities results in poorer health for them and higher health care costs for all. Increased regional segregation by income leads to inefficient commuter patterns and increased transportation infrastructure costs as low-wage workers try to reach their jobs on the Eastside and in Seattle from ever further distances.

The role of the King County Housing Authority (KCHA) is to address the housing needs of our community members who the private market is failing. In 2016, KCHA assisted more than 22,000 households acquire or sustain housing. Without this assistance, a significant number of these households would have been homeless. Even so, our efforts have not been sufficient—the point-in-time homeless count completed in early 2016 reported 4,500 people in King County living unsheltered or in cars or tents. An additional 6,200 were in emergency or transitional housing.

The most essential resources we have for addressing this challenge are our federal housing programs—Public Housing and Housing Choice Vouchers. These are the only programs that enable KCHA to house those most in need—some 16,000 individuals and families with very low incomes, typically around \$37,600. About 60 percent of these households are headed by a senior citizen or an individual with a disability. These

**In 2016, KCHA
assisted more than**

**22,000
HOUSEHOLDS
ACQUIRE OR
SUSTAIN HOUSING**



critical federal resources, however, are not keeping up with the growth in need. The number of households that can be served is roughly one quarter of the total number eligible. The funding provided to Housing Choice Voucher recipients to secure housing from private landlords is lagging significantly behind the rapidly rising rent levels in our market. Capital and operating funding necessary to assure adequate maintenance and repairs for the Public Housing inventory continues to be cut every year.

In the face of inadequate funding, the efficient and effective use of existing resources is critical to house as many households as possible, to leverage other funding, and to support long-range outcomes around self-sufficiency, good health and regional sustainability. This is where the Moving to Work (MTW) program comes in. KCHA was very pleased to receive a 10-year extension of our existing contract early in 2016. The flexibility provided under MTW has enabled KCHA to house more households; align with local partners to address the housing and service needs of the region's most vulnerable and difficult to serve residents, including chronically homeless and disabled veterans; expand geographic choice; preserve and expand our housing stock; support important long term goals for the communities we serve, including education and health outcomes; and operate more efficiently.

Renewal of this crucial tool will enable us to continue to expand and deepen our involvement with local partners and continue to innovate around the critical question of how to most efficiently and effectively serve the housing needs of our community. A number of the program initiatives and demonstration projects pioneered by KCHA under MTW, such as sponsor-based housing for youth and chronically homeless populations, have now been adopted or are being proposed for national replication. Others, such as our re-entry program for justice-involved individuals at Passage Point in partnership with the YWCA, are being recognized as national best practices. Many of these initiatives are detailed in the accompanying report. And KCHA is not unique in this. Across the country, all 39 of the MTW housing authorities are proving on a daily basis that good things come from providing local flexibility, and enabling and encouraging the creativity and partnerships this program can create.

It is important to acknowledge, however, that flexibility, creativity and partnerships cannot fully substitute for resources. The MTW program has enabled KCHA to sustain and, to a certain degree, expand its efforts. But this expansion has not been sufficient in the face of growing need. To fail to strengthen the federal commitment or indeed to reduce it at this critical juncture would be extremely shortsighted. Providing our communities with an adequate supply of safe, affordable housing is an investment that underpins our future as a region and is a moral test of our values as a community.

Providing our
communities with an
adequate supply of

SAFE, AFFORDABLE HOUSING

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underpins our future
as a region.

A photograph of an elderly woman with short, wavy, light-colored hair, smiling warmly at the camera. She is wearing a patterned, short-sleeved top. The background is a garden with large green leaves and several pumpkins, suggesting an autumn setting. The entire image is overlaid with a semi-transparent orange filter.

I. INTRODUCTION

A. OVERVIEW OF SHORT-TERM MTW GOALS AND OBJECTIVES

In 2016, the King County Housing Authority (KCHA) continued to focus on ensuring that our housing assistance reached those with the greatest need while investing in policy and program approaches designed to provide increased housing choice and opportunity for our residents and program participants. This past year, we:

Increased the number of extremely low-income households we served.

KCHA employed multiple strategies to expand our reach: property acquisitions; use of banked Annual Contributions Contract (ACC) authority; project-based rental assistance in partnership with nonprofit developers and service providers; lease-up of new incremental vouchers; over-leasing of our existing Section 8 baseline; and continued use of locally designed subsidy programs to successfully house and support special needs populations. In 2016, KCHA provided assistance to 16,117 households (including the administration of subsidies to 3,078 households porting into the region) through its federally subsidized programs. The number of subsidies issued and administered by KCHA has increased by 1,700 households (excluding port-in households) since entering into the MTW program in 2003. Despite growing challenges in the Seattle region's hot real estate market, KCHA's Section 8 lease-up rate for the year averaged 100.8 percent.

Expanded our portfolio of housing dedicated to low-income households.

KCHA continued to actively seek out property acquisitions to preserve housing affordability in strategic areas of King County, including current and emerging high-opportunity neighborhoods, and transit-oriented development (TOD) sites. This year, we purchased two existing properties, Highland Village in Bellevue and Abbey Ridge Apartments near the new Angle Lake light rail station, which preserved affordability for 222 units in high-cost and emerging markets. By year's end, KCHA's portfolio had grown to more than 9,500 units. The occupancy rate for our portfolio, excluding off-line units, was 98.4 percent.

Fostered partnerships that addressed the multi-faceted needs of the most vulnerable populations in our region.

Of all households that entered into our federally assisted programs in 2016, more than 50 percent were homeless at the time of entry. This figure includes a diverse population with varying needs: disabled veterans; individuals living with chronic mental illness; those with involvement with the criminal justice system; youth who are homeless or transitioning out of foster care; and high-need homeless families with children engaged with the child welfare system. KCHA continued to partner with local service providers, the U.S. Department of Veterans Affairs, and the behavioral health care system to meet our community's supportive housing needs and advance regional goals to make homelessness rare, brief and one-time.

Expanded assistance to homeless and at-risk households through flexible rental assistance programs.

In addition to expanding our service partnerships, KCHA continued to implement and evaluate new ways to effectively use housing assistance dollars to successfully address the needs of our region's growing homeless population. We continued to partner with the Highline School District and its McKinney-Vento liaisons to implement a short-term rent subsidy program that addresses the growing number of homeless students in our public schools. This program successfully re-housed 58 homeless families with 140 children in 2016. Building on what we learned, KCHA partnered with local domestic violence agencies to implement a similar program that served 24 households in 2016. Ongoing evaluation of these efforts, in partnership with the Urban Institute, will help determine whether we seek to significantly expand this approach in 2017-18.

Two key acquisitions in high-cost and emerging markets ensure that

222
UNITS

remain affordable and available to our community's lowest income households.

MORE THAN HALF OF ENTERING HOUSEHOLDS are homeless

Increased geographic choice and access to high-opportunity neighborhoods.

This multi-pronged initiative included the use of a five-tiered, ZIP code-based payment standard system, mobility counseling, and new property acquisitions combined with placement of project-based rental subsidies in targeted high-opportunity neighborhoods within King County. Currently, 26 percent of KCHA's HUD-subsidized households with children live in high- or very high-opportunity neighborhoods. We are committed to increasing this number to 30 percent by the end of 2020. A new partnership with a national research team headed by Stanford economist Raj Chetty was funded by the Bill & Melinda Gates Foundation in 2016 to explore new approaches to mobility counseling and broadening geographic choice.

Deepened partnerships with parents and local school districts with the goal of improving educational outcomes.

More than 14,700 children lived in KCHA's federally subsidized housing throughout 2016. Their academic success is the cornerstone of our efforts to prevent multi-generational cycles of poverty and promote social mobility. KCHA continued to prioritize students' educational success as an integral element of our core mission by actively partnering with local education stakeholders around shared outcomes. These included housing and school stability, improved attendance, better academic performance and higher graduation rates. We focused on multiple approaches for achieving grade-level reading competency by third grade while also supporting improved educational outcomes for older youth through after-school programs, parental engagement and mentoring.

Supported families in gaining greater economic self-sufficiency.

During 2016, KCHA assisted 314 Public Housing and Section 8 households in the Family Self-Sufficiency program. This program advances families toward economic self-sufficiency through individualized case management, supportive services and program incentives. We continued to explore new strategies for promoting improved economic outcomes among residents by assessing needs, identifying gaps in service programs and engaging local workforce development partners.



Invested in the elimination of accrued capital repair and system replacement needs in our federally subsidized housing inventory.

In 2016, KCHA invested more than \$16 million toward our five-year, \$54 million capital plan. This investment improved housing quality, reduced maintenance costs and energy consumption, and extended the life expectancy of our federally assisted housing stock. The average Real Estate Assessment Center (REAC) score for KCHA's public housing inventory in 2016 was 97.2 Percent.

Created more cost-effective programs by streamlining business processes, digitizing client files and leveraging technology in core business functions.

In 2016, KCHA completed the migration of its core business processes to a new software platform. The Authority continued to analyze core business functions and is committed to a continuous improvement framework that engages staff and leverages the functionality of the new software. Significant efficiencies identified through process mapping have saved staff time, reduced intrusion into residents' lives and provided better customer service, including the reorganization of caseloads by ZIP code in order to provide single points of contact for landlords.

Reduced the environmental impact of KCHA's programs and facilities.

KCHA's first Five-Year Resource Management Plan concluded in 2016. Results from this initiative included a 10% reduction in water use, the generation of 100,000 kWh of electricity, the establishment of an Environmental Preferable Purchasing Policy, and the development of a 100-acre environmentally sustainable community, Greenbridge. A new Five-Year Resource Management Plan was adopted in 2016 which further increased goals for resource conservation. We also extended and expanded our existing Energy Performance Contract (EPC) in order to leverage financing for \$21 million in additional energy measures in our public housing inventory. These measures will reduce utility costs for both KCHA and residents, reduce the repair and life-cycle replacement backlog, and further the goals of our Resource Management Plan. By year's end, financing was in place and installation work had begun. In its role as the region's Community Action Partnership (CAP) agency, KCHA also provided \$3.7 million in weatherization measures for 612 public, nonprofit and privately owned low-income housing units during 2016.



Strengthened our research and evaluation capacity.

KCHA continues to increase its internal capacity and develop external partnerships in order to conduct more rigorous program evaluation, advance a long-term research agenda, and partner effectively in large regional and national studies. In 2016, we partnered with the University of Washington to explore our residents' mobility patterns and geographic choices; began planning for the Creating Moves to Opportunity mobility study in collaboration with our university research partners from Harvard and Stanford; obtained a grant to support the integration and analysis of local housing and health data; and engaged research partners in a number of third-party evaluations of our programs. These efforts supported the intent of the MTW program to explore and learn from new approaches to more effectively and efficiently address the housing needs and life outcomes of our communities' extremely low-income residents.



B. OVERVIEW OF LONG-TERM MTW GOALS AND OBJECTIVES

Through participation in the MTW program, KCHA is able to address a wide range of affordable housing needs in the region. We use the single-fund and regulatory flexibility offered through MTW to support our overarching strategic goals:

STRATEGY 1

Continue to strengthen the physical, operational, financial and environmental sustainability of our portfolio of more than 9,500 affordable housing units in 133 properties.

STRATEGY 2

Increase the supply of housing in the region that is affordable to extremely low-income households—those earning below 30 percent of Area Median Income (AMI)—through developing new housing, preserving existing housing, and expanding the size and reach of our rental subsidy programs. Currently, more than 82 percent of the households served through our Public Housing and Section 8 programs have incomes below 30 percent of AMI.

STRATEGY 3

Provide greater geographic choice for low-income households—including disabled residents and elderly residents with mobility impairments—so that our clients have the opportunity to live in neighborhoods with high-performing schools and convenient access to services, transit, health services and employment.

STRATEGY 4

Coordinate closely with behavioral health care and homeless systems to increase the supply of supportive housing for people who have been chronically homeless or have special needs, with the goal of making homelessness rare, brief and one-time.

STRATEGY 5

Engage in the revitalization of King County's low-income neighborhoods, with a focus on housing and services, amenities, institutions and partnerships that create strong, healthy and inclusive communities and promote social mobility.

STRATEGY 7

Expand and deepen partnerships with school districts, Head Start and after-school programs, health providers, community colleges, the philanthropic community, and our residents, with the goal of eliminating the achievement gap, and improving educational and life outcomes for the low-income children and families we serve.

STRATEGY 9

Continue to develop institutional capacity and operational efficiencies to make the most effective use of limited federal resources and provide extraordinary service to our community, clients and partners.

STRATEGY 11

Develop our capacity as a learning organization that uses research and evaluation to drive decisions that shape policies and programs.

STRATEGY 6

Work with King County, regional transit agencies and suburban cities to support sustainable and equitable regional development by integrating new affordable housing into regional growth corridors aligned with mass transit.

STRATEGY 8

Promote greater economic self-sufficiency for families and individuals in subsidized housing by addressing barriers to employment and facilitating access to training and education programs, with the goal of enabling moves to market-rate housing at the appropriate time.

STRATEGY 10

Continue to reduce KCHA's environmental footprint through energy conservation, renewable energy generation, waste stream diversion, green procurement policies, water usage reduction, fleet management practices and tenant education.



II. GENERAL HOUSING AUTHORITY OPERATING INFORMATION

A. HOUSING STOCK INFORMATION

New Housing Choice Vouchers that were Project-based During the Fiscal Year

PROPERTY NAME	ANTICIPATED NUMBER OF NEW VOUCHERS TO BE PROJECT-BASED	ACTUAL NUMBER OF NEW VOUCHERS THAT WERE PROJECT-BASED	DESCRIPTION OF PROJECT
Family Village Redmond	16	10	Permanent Supportive Housing for Homeless Families
Athene	0	8	Housing for Homeless Seniors
Timberwood	0	14	Project-based VASH for Homeless Veterans
TOTAL NUMBER OF NEW PROJECT-BASED VOUCHERS	16	32	

	ANTICIPATED	ACTUAL
TOTAL NUMBER OF PROJECT-BASED VOUCHERS COMMITTED AT THE END OF THE FISCAL YEAR	2,581 ¹	2,467
TOTAL NUMBER OF PROJECT-BASED VOUCHERS LEASED UP OR ISSUED TO A POTENTIAL TENANT AT THE END OF THE FISCAL YEAR	2,515 ²	2,053 ³

Other Changes to the Housing Stock that Occurred During the Fiscal Year

The FY 2016 MTW Plan had projected that an additional 125 subsidies would be project-based this year. The project-basing of units at John Gabriel House and Ronald Commons was completed ahead of schedule, at the close of 2015, while Southwood Square experienced HUD administrative delays and came on in early 2017. Additionally, AYR Arcadia, awarded through the King County Combined Funders Notice of Funding Availability (NOFA), experienced a delay due to siting challenges and is expected to come under contract in 2017.

Due to the flexibilities provided by the MTW program, KCHA was able to add a total of 32 project-based units to its housing inventory by leveraging local partnerships and seizing project-basing opportunities when they arose. Athene was awarded eight project-based vouchers intended to serve homeless seniors while Family Village received subsidies to house 10 homeless families. KCHA also was awarded an additional 150 HUD VASH project-based subsidies, allowing us to immediately bring the Timberwood property (a KCHA-owned asset) under contract to serve homeless veterans. In 2017, 61 additional VASH subsidies will be brought under contract, with sites for the remaining 75 vouchers identified by the end of the year.

General Description of Actual Capital Fund Expenditures During the Plan Year

KCHA continued to improve the quality and long-term viability of our aging affordable housing inventory by investing more than \$16 million in capital repairs, unit upgrades, capital construction and non-routine maintenance. These investments ensure that our housing stock is available and livable for years to come.

- **UNIT UPGRADES (\$5,943,700).** Internal KCHA “force account” crews completed \$4.05 million in upgrades to 150 units at 38 federally subsidized housing sites. Additionally, KCHA performed almost \$1.9 million in non-routine maintenance such as fencing repairs, playground installations and landscaping upgrades.

¹ AHAP and HAP

² HAP only

³ KCHA's former opt-out developments are only able to lease-up when a current resident with a tenant protection voucher moves out, resulting in a lower leasing rate.

KCHA's portfolio
averaged

OVER
97%

in a national
assessment
of real estate
quality.

- **SITE IMPROVEMENTS (\$2,942,000).** Burndale Homes (Auburn), College Place (Bellevue), Firwood Circle (Auburn), and Lake House (Shoreline) received site improvements including new paving, side-walks, curbs and gutters. Additionally, the pedestrian bridge that links the Northridge I (Shoreline) apartment building to its parking lot was replaced. Additional site improvement work, including paving and side-walk projects, began at Briarwood (Shoreline) and Valli Kee (Kent), and will reach completion in 2017. Finally, the planned improvements for Forest Glen (Redmond) were moved forward to 2017 due to conflicts with the waste and water line replacement project.
- **BUILDING ENVELOPE AND RELATED COMPONENTS UPGRADES (\$3,405,000).** Roofs were replaced at Firwood Circle (Auburn) and decks were repaired at Lake House (Shoreline). Shelcor (Auburn) received new siding, doors and windows while a similar scope of work began at Burndale Homes (Auburn) and Hidden Village (Bellevue).
- **"509" INITIATIVE IMPROVEMENTS (\$2,813,000).** In 2016, significant capital improvements were completed at the properties included in the 2013 conversion of 509 scattered-site Public Housing units to Section 8 subsidies. Major work undertaken this year included: a complete envelope upgrade at Evergreen Court (Federal Way); roof replacement at Greenleaf Apartments (Kenmore) and Juanita Trace (Kirkland); and siding and deck replacement at Wells Wood (Woodinville).
- **OTHER IMPROVEMENTS (\$1,361,000).** A storm water project was completed at Boulevard Manor (Burien), site lighting was installed at Valli Kee (Auburn), and new unit and building entry doors were installed at Peppertree (Shoreline). At Forest Glen (Redmond), waste and domestic water lines were replaced.

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year-end

HOUSING PROGRAM	TOTAL UNITS	OVERVIEW OF THE PROGRAM
Preservation Program ⁴	41	This program maintains affordable housing opportunities in LIPHRA buildings under contract to HUD in highly desirable King County neighborhoods.
Home Ownership Program ⁵	430	KCHA's home ownership program offers qualified low-income individuals, families and seniors the opportunity to own a manufactured home located on a leased lot in one of four housing communities.
Bond-Financed Program ⁶	4,338	The bond-finance program is made up of workforce housing (for households earning 80% of AMI or below) that does not receive operating subsidy from the federal government. This program is a key strategy for preserving affordable housing in high-opportunity areas and coordinates closely with the tenant and project-based Housing Choice Voucher programs.
Low-Income Housing Tax Credit Program (LIHTC) ⁷	507	Owned by separate limited partnerships, these units typically are available to households earning 60% of AMI or below. KCHA remains a general partner in the ownership of these units. Like bond-financed properties, LIHTC acquisitions are targeted to low-poverty markets.
Mixed Finance Housing ⁸	602	Properties in this portfolio contain multiple funding sources including LIHTC, Project-based Section 8, and Public Housing. This mixed-finance approach allows KCHA to support a property's debt while allowing our lowest income residents access to these units.
Local Programs ⁹	144	This inventory is made up of emergency and transitional housing units. Some of the programs offer supportive services to homeless families, veterans, victims of domestic violence and people with special needs.
TOTAL OTHER HOUSING OWNED AND/OR MANAGED	6,062	

⁴ Parkway.

⁵ Rainier View Mobile Homes, Tall Cedars, Vantage Glen, Wonderland Estates.

⁶ Abbey Ridge, Alpine Ridge, Arbor Heights, Aspen Ridge, Auburn Square, Bellepark East, Carriage House, Cascadian, Colonial Gardens, Cottonwood, Cove East, Fairwood Apartments, Gilman Square, Heritage Park, Highland Village, Landmark, Laurelwood, Meadowbrook Apartments, Meadows at Lea Hill, Newporter, Parkwood, Rainier View I, Rainier View II, Si View, Somerset Gardens East, Somerset Gardens West, Timberwood, Vashon Terrace (Chaussee), Villages at South Station, Walnut Park, Windsor Heights, Woodland North, Woodridge Park, Woodside East.

⁷ Corinthian Apartments, Overlake, Southwood Square.

⁸ Eastbridge, Harrison House, Nia, Salmon Creek, Seola Crossing I, Valley Park.

⁹ 301 SW Roxbury, 520 SW 102nd St., Anita Vista, Avondale House, Brookside, Burien Vet's House, Campus Green, Echo Cove, Federal Way Duplexes, Harbour Villa, Holt Property, Nike, Slater Park, Shadrach, Sunnydale.



Federally Subsidized Housing Owned and/or Managed by the PHA at Fiscal Year-end

HOUSING PROGRAM	TOTAL UNITS	OVERVIEW OF THE PROGRAM
Public Housing ¹⁰	2,063	KCHA's Public Housing program serves those with the most limited incomes, including seniors, people with disabilities, and families. Many of our Public Housing properties offer on-site services to meet the residents' unique and varied needs.
Project-based Section 8 ¹¹	1,385	Similar to Public Housing, Project-based Section 8 housing targets the county's lowest income households and, in some cases, includes site-specific supportive services.
TOTAL OTHER HOUSING OWNED AND/OR MANAGED	3,448	

¹⁰ Ballinger/Pepper Tree, Boulevard Manor, Briarwood, Brittany Park, Burndale, Casa Juanita, Casa Madrona, Cascade Apartments, College Place, Eastside Terrace, Fairwind, Firwood Circle, Forest Glen, Gustaves Manor, Island Crest Apartments, Kirkland Place Apartments, Lake House, Mardi Gras, Munro Manor, Northridge, Pacific Court, Paramount, Park Royal, Plaza Seventeen, Riverton Terrace-Senior, Shelcor, Sixth Place Apartments, Southridge, Valli Kee, Vantage Point, Wayland Arms, Westminster, Yardley Arms, Zephyr.

¹¹ Avondale, Bellevue 8, Bellevue Manor (Chaussee), Birch Creek, Burien Park, Campus Court, Campus Court II, Cedarwood, Eastridge House, Evergreen Court, Federal Way 3, Forest Grove, Glenview Heights, Green River II, Greenleaf, Hidden Village, Juanita Court, Juanita Trace, Kings Court, Kirkwood Terrace, Newport Apartments, Northlake House, Northwood, Northwood Square (Chaussee), Patricia Harris Manor (Chaussee), Pickering Court, Riverton Terrace-Family, Shoreham, Spiritwood, Victorian Woods, Vista Heights, Wells Wood, Woodcreek Lane Apartments, Young's Lake.

B. LEASING INFORMATION

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

HOUSING PROGRAM	NUMBER OF HOUSEHOLDS SERVED	
	PLANNED	ACTUAL
Number of Units that were Occupied/Leased through Local Non-traditional MTW Funded Property-based Assistance Programs	0	0
Number of Units that were Occupied/Leased through Local Non-traditional MTW Funded Tenant-based Assistance Programs ¹²	305	242
Port-in Vouchers (not absorbed) ¹³	N/A	2,716
TOTAL PROJECTED AND ACTUAL HOUSEHOLDS SERVED	305	2,958

HOUSING PROGRAM	UNIT MONTHS OCCUPIED/LEASED	
	PLANNED	ACTUAL
Number of Units that were Occupied/Leased through Local Non-traditional MTW Funded Property-based Assistance Programs	0	0
Number of Units that were Occupied/Leased through Local Non-traditional MTW Funded Tenant-based Assistance Programs	3,660	2,904
Port-in Vouchers (not absorbed) ¹⁴	N/A	32,592
TOTAL PROJECTED AND ANNUAL UNIT MONTHS OCCUPIED/LEASED	3,660	35,496

¹² Sponsor-based Supportive Housing (121), Next Step (19), Coming Up (20), Student Family Stability Initiative (58), and Domestic Violence Housing First (24).

¹³ Not projected in the 2016 Plan.

¹⁴ Not projected in the 2016 Plan.

	AVERAGE NUMBER OF HOUSEHOLDS SERVED PER MONTH	TOTAL NUMBER OF HOUSEHOLDS SERVED DURING THE YEAR
Households Served through Local Non-traditional Services Only	0	0

Reporting Compliance with Statutory MTW Requirements: 75% of Families Assisted are Very Low-income

FISCAL YEAR:	2013	2014	2015	2016
Total Number of Local, Non-traditional MTW Households Assisted	153	247	214	242
Number of Local, Non-traditional MTW Households with Incomes Below 50% of AMI ¹⁵	153	247	214	242
Percentage of Local, Non-traditional MTW Households with Incomes Below 50% of AMI	100%	100%	100%	100%

Reporting Compliance with Statutory MTW Requirements: Maintain Comparable Mix of Family Sizes Served

BASELINE FOR THE MIX OF FAMILY SIZES SERVED

FAMILY SIZE (IN PERSONS)	1	2	3	4	5	6+	TOTAL
Occupied Number of Public Housing Units by Household Size when PHA Entered MTW	1,201	674	476	360	250	246	3,207
Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW	1,929	1,497	1,064	772	379	344	5,985
Non-MTW Adjustments to the Distribution of Household Sizes	2,003	X	X	X	X	X	2,003
Baseline Number of Household Sizes to be Maintained	5,133	2,171	1,540	1,132	629	590	11,195

¹⁵ All local, non-traditional programs serve those experiencing homelessness so program admissions are assumed at or below 50% of AMI.

FAMILY SIZE (IN PERSONS)	1	2	3	4	5	6+	TOTAL
Baseline Percentages of Family Sizes to be Maintained	45.85%	19.39%	13.76%	10.11%	5.62%	5.27%	100%
EXPLANATION FOR BASELINE ADJUSTMENTS TO THE DISTRIBUTION OF HOUSEHOLD SIZES UTILIZED	Between 2003 and 2014, King County experienced a 64 percent increase of unsheltered single adults. To account for this, we adjusted the baseline for the one-person household to reflect the demographic change $[(1,201 + 1,929) \times 64\% = 2,003]$. ¹⁶						

MIX OF FAMILY SIZES SERVED

FAMILY SIZE (IN PERSONS)	1	2	3	4	5	6+	TOTAL
Baseline Percentages of Household Sizes to be Maintained	45.85%	19.39%	13.76%	10.11%	5.62%	5.27%	100%
Number of Households Served by Family Size this Fiscal Year	5,646	2,945	1,730	1,234	722	762	13,039
Percentages of Households Served by Household Size this Fiscal Year	43.30%	22.59%	13.27%	9.46%	5.54%	5.84%	100%
Percentage of Percentage Change	-5.56%	16.48%	-3.58%	-6.39%	-1.47%	10.89%	0%
Percentage Change	2.55%	-3.20%	0.49%	0.65%	0.08%	-0.57%	0%

JUSTIFICATION AND EXPLANATION FOR FAMILY SIZE VARIATIONS OF OVER 5% FROM THE BASELINE PERCENTAGES	KCHA has maintained its mix of family sizes served.
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¹⁶ 2003 One Night Count (1,899 persons): http://homelessinfo.org/resources/one_night_count/2004_ONC_Report.pdf;
2014 One Night Count (3,772 persons): http://homelessinfo.org/resources/one_night_count/2014_ONC_Street_Count_Summary.pdf.

Description of Any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-traditional Units and Solutions at Fiscal Year-end

HOUSING PROGRAM	DESCRIPTION OF LEASING ISSUES AND SOLUTIONS
Public Housing	The program did not encounter leasing issues in 2016.
Housing Choice Vouchers	<p>King County continued to have one of the most competitive rental markets and lowest vacancy rates in the nation, making it difficult for our voucher holders to compete with nonsubsidized renters. Special purpose voucher holders, those individuals and families facing even greater barriers to securing housing, were even more impacted by the market. Source of Income Discrimination statutes are in place in only four of 39 suburban jurisdictions in King County.</p> <p>This past year, we implemented a five-tiered, ZIP code-based payment standard system that more closely matches area submarket costs and implemented a one-time increase across all tiers in October. Additionally, we began exploring additional ways to support voucher holders in securing a home. Potential interventions include: unit holding fees; expedited lease-up processes for preferred landlords; geographic organization of caseloads to improve customer service to landlords; ongoing re-evaluation of payment standards; creation of a new landlord liaison position within KCHA; and flexible funding to assist participants with back rent and utilities, application fees and deposits. Voucher shopping success rates at the end of the year stood at 71 percent.</p>
Local, Non-traditional	<p>Successfully leasing an apartment and maintaining housing stability in a tight rental market with a population that already faces multiple barriers remained a challenge for our local, non-traditional programs in 2016. The sponsor-based supportive housing program remained a key strategy to housing individuals who are otherwise unsuccessful finding and securing a place to live on the private market. Our locally designed Project-based Section 8 program is another tool that allows us to successfully house this population by having the ability to more nimbly partner with local nonprofits and determine the size of our program. Alongside our partners, we also continued to explore the use of additional resources, such as landlord engagement, housing search navigation services, and housing stability support to encourage lease-up on the private market.</p>

Number of Households Transitioned to Self-sufficiency by Fiscal Year-end

ACTIVITY NAME/#	NUMBER OF HOUSEHOLDS TRANSITIONED	AGENCY DEFINITION OF SELF-SUFFICIENCY
Stepped-down Assistance for Homeless Youth (2014-1)	20	Maintain housing
Passage Point Prisoner Re-entry Housing Program (2013-1)	12	Positive move to Public Housing or other independent housing
EASY & WIN Rent (2008-10, 2008-11)	235	Positive move from KCHA to unsubsidized housing
Develop a Sponsor-based Housing Program (2007-6)	98	Maintain housing
Households Duplicated Across Activities/Definitions	0	
ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF-SUFFICIENCY		365

In 2016, 365 households successfully moved on from KCHA's federally subsidized housing. Of those, 235 achieved self-sufficiency by moving to non-subsidized housing and 130 maintained stable housing after experiencing homelessness or incarceration.

Innovative MTW policies assisted

365
HOUSEHOLDS
transition to self-sufficiency in 2016.

C. WAIT LIST INFORMATION

Wait List Information at Fiscal Year-end

HOUSING PROGRAM	WAIT LIST TYPE	NUMBER OF HOUSEHOLDS ON WAIT LIST	WAIT LIST OPEN, PARTIALLY OPEN OR CLOSED	WAS THE WAIT LIST OPENED DURING THE FISCAL YEAR?
Section 8 Housing Choice Voucher ¹⁷	Community-wide	700	Closed	No
Public Housing	Other: Regional	7,678	Open	Yes
Public Housing	Site-based	7,402	Open	Yes
Project-based	Other: Regional	2,549	Open	Yes
Public Housing—Conditional Housing	Program-specific	27	Open	Yes

Description of Other Wait Lists

PUBLIC HOUSING, OTHER: Applicants are given the choice among three regions, each with their own wait list. The applicant is able to choose two of the three regions. KCHA uses a rotation system among this applicant pool and those who enter through a specialized program, such as our transitional housing program, when assigning a unit to a household in its region of choice.

PROJECT-BASED, OTHER: This wait list mirrors the process for the Public Housing regional wait list described above. Applicants are given the opportunity to apply for the region of their choice. KCHA may pre-screen a cluster of applicants prior to receiving notice of available units from an owner in order to ensure eligibility and facilitate rapid referral.

¹⁷ Remaining applicants from 2,500 households selected by lottery from the 22,000 households that applied during a two-week application period in early 2015.



III. PROPOSED MTW ACTIVITIES

New activities are proposed in the annual MTW Plan.



IV. APPROVED MTW ACTIVITIES

A. IMPLEMENTED ACTIVITIES

The following table provides an overview of KCHA's implemented activities, the statutory objectives they aim to meet, and the page number in which more detail can be found.

YEAR- ACTIVITY #	MTW ACTIVITY	STATUTORY OBJECTIVE	PAGE
2016-2	Conversion of Former Opt-out Developments to Public Housing	Cost-effectiveness	31
2014-1	Stepped-down Assistance for Homeless Youth	Self-sufficiency	32
2014-2	Revised Definition of "Family"	Housing Choice	34
2013-1	Passage Point Prisoner Re-entry Housing Program	Housing Choice	35
2013-2	Flexible Rental Assistance	Housing Choice	38

YEAR- ACTIVITY #	MTW ACTIVITY	STATUTORY OBJECTIVE	PAGE
2012-2	Community Choice Program	Housing Choice	39
2009-1	Project-based Section 8 Local Program Contract Term	Housing Choice	40
2008-1	Acquire New Public Housing	Housing Choice	41
2008-10 & 2008-11	EASY and WIN Rent Policies	Cost-effectiveness	42
2008-21	Public Housing and Section 8 Utility Allowances	Cost-effectiveness	44
2007-6	Develop a Sponsor-based Housing Program	Housing Choice	46
2007-14	Enhanced Transfer Policy	Cost-effectiveness	47
2005-4	Payment Standard Changes	Housing Choice	49
2004-2	Local Project-based Section 8 Program	Cost-effectiveness	51
2004-3	Develop Site-based Waiting Lists	Housing Choice	53
2004-5	Modified Housing Quality Standards (HQS) Inspection Protocols	Cost-effectiveness	55
2004-7	Streamlining Public Housing and Section 8 Forms and Data Processing	Cost-effectiveness	56
2004-9	Rent Reasonableness Modifications	Cost-effectiveness	58
2004-12	Energy Services Company (ESCO) Development	Cost-effectiveness	59
2004-16	Section 8 Occupancy Requirements	Cost-effectiveness	59

MOVING TO WORK LEADS THE WAY

POLICY CHANGE	KCHA IMPLEMENTATION YEAR	HUD IMPLEMENTATION YEAR
Developed local policies for the allocation of project-based vouchers	2004	2014
Allowed landlord self-certification of repairs after inspection	2004	2012
Modified HQS inspection protocols	2004	2014
Waived the cap on the number of units that can be project-based at a single site	2004	2017
Implemented exception payment standards that exceed FMRs	2005	2010
Allowed self-certification of assets under \$5000	2008	2013
Streamlined reexamination for elderly and disabled households	2008	2013
Extended the time limit for project-based contracts	2009	2014
Revised interim reviews of income	2010	2012
Waived the cap on the amount of HCV budget authority that can be project-based	2010	2017

ACTIVITY 2016-2: Conversion of Former Opt-out Developments to Public Housing

MTW STATUTORY OBJECTIVE: Increase Cost-effectiveness

APPROVAL: 2016

IMPLEMENTED: 2016

CHALLENGE: The process to convert a property's subsidy model from project-based Section 8 to Public Housing is slow, burdensome and administratively complex. Under current federal guidelines, units convert only when the original resident moves out with a voucher. This transition is gradual, and at properties housing seniors or disabled residents, turnover of units tends to be especially slow. In the meantime, two sets of rules—project-based Section 8 and Public Housing—simultaneously govern the management of the development, adding to the administrative complexity of providing housing assistance.

SOLUTION: This policy allows KCHA to convert entire Project-based Section 8 opt-out properties to Public Housing at once, while preserving the rights of existing tenants.

This activity builds upon KCHA's previously approved initiative (2008-1) to expand housing through use of banked Public Housing ACC units. KCHA can convert former project-based "opt-out" sites to Public Housing through the development process outlined in 24 CFR 905, rather than through the typical gradual transition. As a result, this policy greatly streamlines operations and increases administrative efficiency. With transition to Public Housing subsidy, current enhanced voucher participants retain protections against future rent increases in much the same manner previously provided. As a Public Housing resident, these households pay an affordable rent (based on policies outlined in KCHA's Public Housing ACOP) and thus remain protected from a private owner's decision to increase the contract rent. At the same time, KCHA's MTW-enhanced Transfer Policy ensures that former enhanced voucher recipients retain the same (if not greater) opportunity for mobility by providing access to transfer to other subsidized units within KCHA's portfolio or use of a general Housing Choice Voucher should future need arise.

KCHA works with affected residents of selected former opt-out properties, providing ample notification and information (including the right to move using a general voucher for current enhanced voucher participants) in order to ensure the development's seamless transition to the Public Housing program.

PROGRESS AND OUTCOMES: KCHA converted Burien Park, Northlake House, Northwood and the remaining 35 project-based Section 8 units at Westminster to Public Housing, saving an estimated 40 hours per year in staff time.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$1,320 saved	\$1,320 ¹⁸ saved	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved	40 hours saved	40 hours saved	Achieved

¹⁸ This figure was calculated by multiplying the median hourly wage and benefits (\$33) of staff who oversee this activity by the number of hours saved. The number is a monetization of the hours saved through the implementation of this program.

"This program has given me the opportunity to foster my independence. I'm very grateful—it has helped guide my educational and career goals in a positive direction. Because of this, I will have a greater chance at succeeding."

NEXT STEP PARTICIPANT

ACTIVITY 2014-1: Stepped-down Assistance for Homeless Youth

MTW STATUTORY OBJECTIVE: Increase Self-sufficiency

APPROVAL: 2014

IMPLEMENTED: 2014

CHALLENGE: During the January 2016 point-in-time homeless count in King County, 824 youth and young adults were identified as homeless or unstably housed, a 6 percent increase from 2014.¹⁹ Local service providers have identified the need for a short-term, gradually diminishing rental subsidy structure to meet the unique needs of these youth.

SOLUTION: KCHA has implemented flexible, "stepped-down" rental assistance models in partnership with other government and philanthropic funders and local youth service providers. Our service provider partners find that a short-term rental subsidy, paired with supportive services, is the most effective way to serve homeless youth as a majority of them do not require extended tenure in a supportive housing environment. By providing limited-term rental assistance and promoting graduation to independent living, more youth can be served effectively through this program model. KCHA is partnering with the YMCA to administer the Next Step program, and with Valley Cities Counseling and Consultation to operate the Coming Up initiative. These programs offer independent housing opportunities to young adults (ages 18 to 25) who are either exiting homelessness or currently living in service-rich transitional housing. Participants secure their apartment, sign a lease and work with a resource specialist to assure longer-term housing stability.

PROGRESS AND OUTCOMES: Successful client outcomes demonstrated under the Next Step pilot have enabled King County's Continuum of Care to secure additional federal and local resources and to scale the stepped rent program concept beyond the pilot. For this reason, KCHA began ramping down the Next Step program in 2016. In 2017, we will assess our youth and young adult investments and will consider if other homeless young adult programs that we administer should adopt the stepped rent model.

¹⁹ *Count Us In 2016: King County's Point-in-Time Count of Homeless & Unstably Housed Young People.* <http://allhomekc.org/wp-content/uploads/2016/03/Count-Us-In-2016-Report-final-1.pdf>

HUD METRICS					
MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase self-sufficiency	SS #1: Average earned income of households affected by this policy	\$0/month	Next Step: \$777/month Coming Up: \$200/month	Next Step: \$1,147/month Coming Up: \$212/month	Exceeded
Increase self-sufficiency	SS #3: Employment status for heads of household	(1) Employed Full-time 0 participants	5 participants	14 participants	Partially Achieved
		(2) Employed Part-time 0 participants	10 participants	7 participants	
		(3) Enrolled in an Educational Program 0 participants	5 participants	11 participants	
		(4) Enrolled in Job-training Program 0 participants	2 participants	0 participants	
		(5) Unemployed 0 participants	0 participants	4 participants	
		(6) Other 0 participants	0 participants	0 participants	
Increase self-sufficiency	SS #5: Number of households receiving services	0 households	45 households	39 households	Partially Achieved
Increase self-sufficiency	SS #7: Tenant rent share	0 households	Next Step: 4 households at 30% of contract rent Coming Up: 10 paying \$50 or more toward contract rent	Next Step: 1 household at 60% of contract rent Coming Up: 16 paying \$50 or more toward contract rent	Exceeded
Increase self-sufficiency	SS #8: Households transition to self-sufficiency ²⁰	0 households	45 households	20 households	Partially Achieved

²⁰ Self-sufficiency for this activity is defined as securing and maintaining housing.

ACTIVITY 2014-2: Revised Definition of “Family”

MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2014

IMPLEMENTED: 2014

CHALLENGE: According to a January 2016 point-in-time count, 3,012 families with children were living unsheltered or in temporary housing in King County.²¹ Thousands more elderly and disabled people, many with severe rent burdens, are homeless or on our waiting lists with no new federal resources anticipated.

SOLUTION: This policy directs KCHA’s limited resources to populations facing the greatest need: elderly, near-elderly and disabled households; and families with minor children. We modified the eligibility standards outlined in the Public Housing Admissions and Continued Occupancy Policy (ACOP) and Section 8 Administrative Plans to limit eligible households to those that include at least one elderly or disabled individual or a minor/dependent child. The current policy affects only admissions and does not affect the eligibility of households currently receiving assistance. Exceptions will be made for participants in programs that target specialized populations such as domestic violence victims or individuals who have been chronically homeless.

PROGRESS AND OUTCOMES: KCHA continued to apply this policy to new applicants, sustaining a reduced wait list time of 25 months.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase housing choices	HC #3: Average applicant time on wait list (in months)	29 months	25 months	25 months	Achieved
Increase housing choices	HC #4: Number of households at or below 80% AMI that would lose assistance or need to move	0 households	0 households	0 households	Achieved

²¹ HUD’s 2016 Continuum of Care Homeless Assistance Programs Homeless Populations and Subpopulations (WA-500). https://www.hudexchange.info/resource/reportmanagement/published/CoC_PopSub_CoC_WA-500-2015_WA_2016.pdf.

ACTIVITY 2013-1: Passage Point Prisoner Re-entry Housing Program

MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2013

IMPLEMENTED: 2013

CHALLENGE: In 2015, 1,416 individuals in King County returned to the community after a period of incarceration.²² Nationally, more than half of all inmates are parents who will face barriers to securing housing and employment upon release due to their criminal record or lack of job skills.²³ Without a home or employment, many of these parents are unable to reunite with their children.

SOLUTION: Passage Point is a unique supportive housing program that serves parents trying to reunify with their children following a period of incarceration. KCHA provides 46 project-based Section 8 vouchers while the YWCA provides property management and supportive services. The YWCA identifies eligible individuals through outreach to prisons and correctional facilities. In contrast to typical transitional housing programs that have strict 24-month occupancy limits, Passage Point participants may remain in place until they have completed the reunification process, are stabilized in employment and can demonstrate their ability to succeed in a less service-intensive environment. Passage Point participants who complete the program and regain custody of their children may apply to KCHA's Public Housing program and receive priority placement on the wait list.

PROGRESS AND OUTCOMES: In 2016, 69 households lived and participated in services at Passage Point. Of these households, 12 were able to graduate to permanent housing. Passage Point was featured in HUD's report on re-entry housing programs for justice-involved individuals titled "It Starts with Housing."

12

JUSTICE-INVOLVED PARENTS

were reunited with their children and graduated to permanent housing.

²² Washington State Department of Corrections. Number of Prison Releases by County of Release. <http://www.doc.wa.gov/information/data/docs/admissions-releases-by-county.pdf>

²³ Glaze, L E and Maruschak, M M (2008). Parents in Prison and Their Minor Children. <http://www.bjs.gov/index.cfm?ty=pbdetail&iid=823>



HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #4: Amount of funds leveraged in dollars	\$0	\$500,000	\$719,000	Exceeded
Increase housing choices	HC #5: Number of households able to move to a better unit ²⁴	0 households	40 households	69 households	Exceeded
Increase housing choices	HC #7: Number of households receiving services aimed to increase housing choice	0 households	40 households	69 households	Exceeded

²⁴ Better unit is defined as stable housing.

HUD METRICS					
MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase self-sufficiency	SS #1: Average earned income of households affected by this policy	\$0	\$3,584	\$3,604	Exceeded
Increase self-sufficiency	SS #3: Employment status for heads of household	(1) Employed Full-time 0 participants	15	16	Partially Achieved
		(2) Employed Part-time 0 participants	15	13	
		(3) Enrolled in an Educational Program 0 participants	15	16	
		(4) Enrolled in Job Training Program 0 participants	12	0	
		(5) Unemployed 0 participants	0	21	
		(6) Other 0 participants	19	0	
Increase self-sufficiency	SS #8: Number of households transitioned to self-sufficiency ²⁵	0 households	5 households	12 households	Exceeded

²⁵ Self-sufficiency in this activity is defined as graduating to Public Housing or other independent housing.

The Student
and Family
Stability Initiative
provided housing
assistance to

140
HOMELESS
STUDENTS
AND THEIR
FAMILIES.

ACTIVITY 2013-2: Flexible Rental Assistance

MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2013

IMPLEMENTED: 2013

CHALLENGE: The one-size-fits-all approach of traditional housing programs does not provide the flexibility needed to quickly and effectively meet the needs of low-income individuals facing distinct housing crises, such as homelessness and domestic violence. In many of these cases, a short-term rental subsidy paired with responsive, individualized case management can help a family out of a crisis situation and into safe, stable housing.

SOLUTION: This activity, developed with local service providers, offers flexible housing assistance to families in crisis. KCHA provides flexible financial assistance, including time-limited rental subsidy, security deposits, rent arrears and funds to cover move-in costs, while our partners provide individualized services. Participants work with a caseworker during and after the program to secure and maintain housing. Two initiatives, one targeting families with homeless school children and the second, survivors of domestic violence, are testing this concept. The Student and Family Stability Initiative (SFSI) pairs short-term rental assistance with housing stability and employment navigation services for families experiencing or on the verge of homelessness. School-based McKinney-Vento liaisons identify and connect these families with community-based service providers while caseworkers have the flexibility to determine the most effective approach to quickly stabilize participants in housing. The second program, Domestic Violence Housing First, quickly identifies and secures housing for survivors of domestic violence. Like SFSI, a case manager works with families to determine and administer support that addresses their most immediate needs.

PROGRESS AND OUTCOMES: In 2016, SFSI helped 58 families secure housing in their children's school district while the Domestic Violence Housing First program housed 24 families.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase housing choices	HC #5: Number of households able to move to a better unit	0 households	20 households	82 households ²⁶	Exceeded
Increase housing choices	HC #7: Number of households receiving services aimed to increase housing choice	0 households	20 households	145 households ²⁷	Exceeded

ACTIVITY 2012-2: Community Choice Program

MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2012

IMPLEMENTED: 2013

CHALLENGE: Research increasingly demonstrates that people's health, employment status and educational success are influenced enormously by where they grow up. Currently, 26 percent of KCHA's families with children live in high-opportunity neighborhoods of King County that can help promote positive life outcomes. High-opportunity neighborhoods are characterized by lower poverty rates, better educational and employment opportunities, and proximity to major transportation hubs.²⁸ These neighborhoods also have higher rents. For a wide variety of reasons, low-income families are more likely to live in communities with higher overall poverty and less access to these benefits.

SOLUTION: This initiative is designed to encourage and enable Housing Choice Voucher households with young children to relocate to areas of the county with higher achieving school districts and other community benefits. In addition to formidable barriers to accessing these neighborhoods, many households are not aware of the link between location and educational and employment opportunities. Through collaboration with local nonprofits and landlords, the Community Choice Program offers one-on-one counseling to households in deciding where to live, help securing housing in the community of choice and ongoing support once a family moves to a new neighborhood.

PROGRESS AND OUTCOMES: KCHA is in the process of transitioning to a structured Housing Voucher Mobility pilot, supported with foundation funding, in 2017. As a consequence, KCHA in 2016 began the process of closing out the current Community Choice Program through attrition to support the new approach. The final households will graduate from the program in the summer of 2017 and an evaluation will follow soon after. We will continue to test various approaches to promoting geographic mobility among our voucher holders through the Creating Moves to Opportunity Northwest Mobility Study. This multi-year research project will utilize control groups to better assess the effectiveness of specific interventions in encouraging opportunity moves by voucher holders.

²⁶ SFSI: 58 families housed; DVHF: 24 families housed.

²⁷ SFSI: 117 households served; DVHF: 28 households served.

²⁸ Neighborhood opportunity designations are from the Puget Sound Regional Council and Kirwan Institutes' Opportunity Mapping index (<http://www.psrc.org/growth/growing-transit-communities/regional-equity/opportunity-mapping/>).

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase housing choices	HC #5: Number of households able to move to a better unit and/or neighborhood of opportunity	0 households move	20 households move	8 households move	Partially Achieved
Increase housing choices	HC #7: Number of households receiving services aimed to increase housing choice	0 households	35 households	94 households	Exceeded

ACTIVITY 2009-1: Project-based Section 8 Local Program Contract Term**MTW STATUTORY OBJECTIVE:** Increase Housing Choice**APPROVAL:** 2009**IMPLEMENTED:** 2009

CHALLENGE: Prior to 2009, our nonprofit development partners faced difficulties securing private financing for the development and acquisition of affordable housing projects where cash flow was being provided by short-term rental assistance commitments. Measured against banking and private equity underwriting standards, the maximum Housing Assistance Payments (HAP) contract term allowed by HUD is too short and hinders the underwriting of debt on affordable housing projects.

SOLUTION: This activity extends the allowable term for Section 8 project-based contracts to 15 years. The longer term assists our partners in underwriting and leveraging private financing for development and acquisition projects. The longer-term commitment from KCHA signals to lenders and underwriters that proposed projects have sufficient cash flow to take on the debt necessary to develop or acquire affordable housing units.

PROGRESS AND OUTCOMES: KCHA continued to save 20 hours of staff time per each 15-year contract, of which there are currently three.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$880 saved	\$880 saved ²⁹	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved per contract	20 hours saved per 15-year contract	20 hours saved per 15-year contract	Achieved

²⁹ This figure was calculated by multiplying the median hourly wage and benefits (\$44) of the staff member who oversees this activity by the number of hours saved. The number is a monetization of the hours saved through the implementation of this program.

ACTIVITY 2008-1: Acquire New Public Housing

MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2008

IMPLEMENTED: 2008

CHALLENGE: In King County, about half of all renter households spend more than 30 percent of their income on rent.³⁰ Countywide, fewer than 15 percent of all apartments are considered affordable to households earning less than 30 percent of AMI.³¹ In context of these challenges, KCHA's Public Housing wait lists continue to grow. Given the gap between available, affordable housing and the number of low-income renters, KCHA must continue to increase the inventory of units affordable to extremely low-income households.

SOLUTION: KCHA's Public Housing ACC is currently below the Faircloth limit in the number of allowable units. These "banked" Public Housing subsidies allow us to add to the affordable housing supply in the region by acquiring new units. This approach is challenging, however, because Public Housing units cannot support debt. We continued our innovative use of MTW working capital, with a particular focus on the creation or preservation of units in high-opportunity neighborhoods.³²

We are working to further simplify the acquisition and addition of units to our Public Housing inventory by partnering with the local HUD field office to streamline the information needed to add these units to the PIC system and obtain operating and capital subsidies. We also are establishing a process for self-certification of neighborhood suitability standards and Faircloth limits, necessitating the flexibility granted in Attachment D, Section D of our MTW Agreement.³³

PROGRESS AND OUTCOMES: In 2016, KCHA completed the conversion of Westminster Manor, a property serving seniors and people with disabilities that was acquired in 2012, to Public Housing. Additionally, Burien Park, Northlake House and Northwood converted to Public Housing in October 2016.

³⁰ US Census Bureau, ACS 2015 5-year estimates: 47.1% of King County renter households pay 30% or more of household income on gross rent. https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_15_5YR_DP04&prodType=table

³¹ US Census Bureau, ACS 2014 5-year estimates: 14.4% of King County rental units have gross rents under \$750. https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ACS_15_5YR_DP04&prodType=table. HUD FY2015 Income Limits Documentation System: 30% AMI for a household of four is \$29,055. For a household making \$29,055 per year, spending no more than 30% of income on rent translates to \$726 or less in asking rent.

³² Neighborhood opportunity designations are from the Puget Sound Regional Council and Kirwan Institutes' Opportunity Mapping index (<http://www.psrc.org/growth/growing-transit-communities/regional-equity/opportunity-mapping/>).

³³ Some Public Housing units might be designated MTW Neighborhood Services units over this next year upon approval from the HUD field office.

In 2016, KCHA
added over

200
UNITS

to its Public
Housing
inventory,
ensuring their
affordability for
the long-term.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase housing choices	HC # 1: Number of new housing units made available for households at or below 80% AMI	0 units (2004)	700 units (cumulative through 2018)	209 units ³⁴ (443 cumulative)	In Progress
Increase housing choices	HC #2: Number of housing units at or below 80% AMI that would not otherwise be available	0 units	700 units (cumulative through 2018)	209 units (443 cumulative)	In Progress
Increase housing choices	HC #5: Number of households able to move to an opportunity neighborhood	0% of new units	50% of new units	51% of new units	Exceeded

ACTIVITY 2008-10 AND 2008-11: EASY and WIN Rent Policies

MTW STATUTORY OBJECTIVE: Increase Cost-effectiveness

APPROVAL: 2008

IMPLEMENTED: 2008

CHALLENGE: The administration of rental subsidies under existing HUD rules can be complex and confusing to the households we serve. Significant staff time was being spent complying with federal requirements that do not promote better outcomes for residents, safeguard program integrity or save taxpayer money. The rules regarding medical deductions, annual reviews and recertifications, and income calculations were cumbersome and often hard to understand, especially for the many elderly and disabled people we serve. These households live on fixed incomes that change only when there is a Cost of Living Adjustment (COLA), making annual reviews superfluous. For working households, HUD's rent rules include complicated earned-income disregards that serve as disincentives to income progression and employment advancement.

SOLUTION: KCHA has instituted two rent reform policies. The first, EASY Rent, simplifies rent calculations and recertifications for elderly and disabled households that derive 90 percent of their income from a fixed source (such as Social Security, Supplemental Security Income [SSI] or pension benefits), and are enrolled in our Public Housing, Housing Choice Voucher or project-based Section 8 programs. Rents are calculated at 28 percent of

³⁴ Westminster Manor (35 units), Burien Park (102 units), Northlake House (38 units), and Northwood (34 units).

adjusted income with deductions for medical- and disability-related expenses in \$2,500 bands and a cap on deductions at \$10,000. EASY Rent streamlines KCHA operations and simplifies the burden placed on residents by reducing recertification reviews to a three-year cycle and placing rent adjustments based on COLA increases in Social Security and SSI payments on an annual cycle.

The second policy, **WIN RENT**, was implemented in FY 2010 to encourage increased economic self-sufficiency among households where individuals are able to work. WIN Rent is calculated based on a series of income bands and the tenant's share of the rent is calculated at 28.3 percent of the lower end of each income band. This tiered system—in contrast to existing rent protocols—does not punish increases in earnings, as the tenant's rent does not change until household income increases to the next band level. Additionally, recertifications are conducted biennially instead of annually, allowing households to retain all increases in earnings during that time period without an accompanying increase to the tenant's share of rent. The WIN Rent structure also eliminates flat rents, income disregards and deductions (other than childcare for eligible households), and excludes the employment income of household members under age 21. Households with little or no income are given a six-month reprieve during which they are able to pay a lower rent or, in some cases, receive a credit payment. Following this period, a WIN Rent household pays a minimum monthly rent of \$25 regardless of income calculation.

In addition to changes to the recertification cycle, we also have streamlined processing and reviews. For example, we limit the number of tenant-requested reviews to reduce rent to two occurrences in a two-year period in the WIN Rent program. We estimate that these policy and operational modifications have reduced the relevant administrative workloads in the Section 8 and Public Housing programs by 20 percent.

PROGRESS AND OUTCOMES: KCHA continues to realize significant savings in staff time and resources through the simplified rent calculation protocol, saving close to 6,000 hours in 2016.

235

HOUSEHOLDS TRANSITIONED

to unsubsidized
housing in 2016.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE ³⁵	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$116,787 saved ³⁶	\$190,265 saved	Exceeded
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved	3,000 HCV staff hours saved; 450 PH staff hours saved	4,586 HCV staff hours saved; 1,179 PH staff hours saved	Exceeded
Increase self-sufficiency	SS #1: Average income of households (EASY)	HCV: \$10,617 PH: \$10,514	2% increase	HCV: \$11,615 PH: \$10,944	Exceeded
Increase self-sufficiency	SS #1: Average earned income of households (WIN)	HCV: \$7,983 PH: \$14,120	3% increase	HCV: \$13,016 PH: \$16,021	Exceeded
Increase self-sufficiency	SS #8: Households transition to self-sufficiency ³⁷	0 households	25 households	235 households	Exceeded

ACTIVITY 2008-21: Public Housing and Section 8 Utility Allowances

MTW STATUTORY OBJECTIVE: Increase Cost-effectiveness

APPROVAL: 2008

IMPLEMENTED: 2010

CHALLENGE: KCHA was spending more than \$22,000 annually in staff time to administer utility allowances under HUD's one-size-fits-all national guidelines. HUD's national approach failed to capture average consumption levels in the Puget Sound area.

SOLUTION: This activity simplifies the HUD rules on Public Housing and Section 8 Utility Allowances by applying a single methodology that reflects local consumption patterns and costs. Before this policy change, allowances were calculated for individual units and households using different rules under the various HUD programs. Additionally, HUD required an immediate update of the allowances with each cumulative 10 percent rate increase by utility companies. Now, KCHA provides allowance adjustments annually when the Consumer Price Index produces a change (decrease or increase) of more than 10 percent rather than each time an adjustment is made to the

³⁵ 2010 earned income baseline from Rent Reform Impact Report, John Seasholtz.

³⁶ This figure was calculated by multiplying the median hourly wage and benefits (\$33) of the staff members who oversee this activity by the number of hours saved. This number is a monetization of the hours saved through the implementation of this program.

³⁷ Self-sufficiency is defined as a positive move from subsidized housing.



utility equation. We worked with data from a Seattle City Light study completed in late 2009 to identify key factors in household energy use and develop average consumption levels for various types of units in the Puget Sound region. We used this information to create a new utility schedule that considers various factors: type of unit (single vs. multi-family), size of unit, high-rise vs. low-rise units, and the utility provider. We modified allowances for units where the resident pays water and/or sewer charges. KCHA's Hardship Policy, adopted in July 2010, also allows KCHA to respond to unique household or property circumstances and documented cases of financial hardship.

PROGRESS AND OUTCOMES: KCHA continued to set utility allowances to the streamlined regional utility schedule, allowing us to save close to 300 hours of staff time this past year.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$22,116 saved ³⁸	\$22,420 saved	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved	291 hours saved	295 hours saved	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 minutes saved per HCV file and 0 minutes saved per PH file	2.5 minutes saved per HCV file and 5 minutes saved per PH file	2.5 minutes saved per HCV file and 5 minutes saved per PH file	Achieved

³⁸ This figure was calculated by multiplying the median hourly wage and benefits (\$76) of the staff member who oversees this activity by the number of hours saved. The number is a monetization of the hours saved through the implementation of this program.

KCHA's sponsor-based supportive housing program provided a safe, stable place to call home to

121
OF THE
HARDEST-
TO-HOUSE
INDIVIDUALS.

ACTIVITY 2007-6: Develop a Sponsor-based Housing Program

MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2007

IMPLEMENTED: 2007

CHALLENGE: According to the January 2016 point-in-time count, 814 individuals in King County were chronically homeless.³⁹ Providing Housing Choice Voucher assistance to these households is frequently not effective. Many landlords are hesitant to sign a lease with an individual who has been chronically homeless due to poor or non-existent rental history, lack of consistent employment, or criminal background. Most people who have been chronically homeless require additional support, beyond rental subsidy, to secure and maintain a safe, stable place to live.

SOLUTION: In the sponsor-based housing program, KCHA provides housing funds directly to our behavioral health care partners, including Sound Mental Health, Navos Mental Health Solutions, and Valley Cities Counseling and Consultation. These providers use the funds to secure private market rentals that are then sub-leased to program participants. The programs operate under the "Housing First" model of supportive housing, which couples low-barrier placement in permanent, scattered-site housing with intensive, individualized services that help residents maintain long-term housing stability. Recipients of this type of support are referred from the mental health system, street outreach teams, and through King County's Coordinated Entry for All system. Once a resident is stabilized and ready for a more independent living environment, KCHA may offer transition to a tenant-based Section 8 subsidy.

PROGRESS AND OUTCOMES: We continued to serve the hardest-to-house populations through a Housing First model that coordinates across the housing, mental health and homeless systems. This program provided stable, supportive housing to 121 households who previously experienced long periods of homelessness.

³⁹ CoC Dashboard Report (WA-500). 2016 Continuum of Care Homeless Assistance Programs Homeless Populations and Subpopulations. https://www.hudexchange.info/resource/reportmanagement/published/CoC_PopSub_CoC_WA-500-2015_WA_2016.pdf

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase housing choices	HC #1: Number of new units made available for households at or below 80% AMI	0 units	117 units	117 units	Achieved
Increase housing choices	HC #5: Number of households able to move to a better unit	0 households	120 households	121 households	Exceeded
Increase self-sufficiency	SS #5: Number of households receiving services aimed to increase self-sufficiency	0 households	120 households	121 households	Exceeded
Increase self-sufficiency	SS #8: Number of households transitioned to self-sufficiency ⁴⁰	0 households	100 households	98 households	Partially Achieved

ACTIVITY 2007-14: Enhanced Transfer Policy

MTW STATUTORY OBJECTIVE: Increase Cost Effectiveness

APPROVAL: 2007

IMPLEMENTED: 2007

CHALLENGE: HUD rules restrict a resident from moving from Public Housing to Section 8 or from Section 8 to Public Housing, which hampers our ability to meet the needs of our residents. For example, project-based Section 8 residents may need to move if their physical abilities change and they no longer can access their second-story, walk-up apartment. A Public Housing property may have an accessible unit available. Under traditional HUD regulations, this resident would not be able to move into this available unit.

SOLUTION: KCHA's policy allows a resident to transfer among KCHA's various subsidized programs and expedites access to Uniform Federal Accessibility Standards (UFAS)-rated units for mobility-impaired households. In addition to mobility needs, a household might grow in size and require a larger unit with more bedrooms. The enhanced transfer policy allows a household to move to a larger unit when one becomes available in either program. In 2009, KCHA took this one step further by actively encouraging over-housed or under-housed residents to transfer when an appropriately sized unit becomes available through incentive payments. The flexibility provided through this policy allows us to swiftly meet the needs of our residents by housing them in a unit that suits their situation best and enables KCHA to provide the most efficient fit of family and unit size, regardless of which federal subsidy is being received.

⁴⁰ Self-sufficiency is defined as stabilizing in housing.



PROGRESS AND OUTCOMES: In 2016, nine households that traditionally would not have been eligible for a change of unit were able to move to a more suitable unit.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Increase housing choices	HC # 5: Number of households able to move to a better unit and/ or opportunity neighborhood	0 households	10 households	9 households ⁴¹	Partially Achieved

⁴¹ One household transferred from project-based Section 8 to Public Housing while eight households received an incentive payment to move to an appropriately sized unit.

ACTIVITY 2005-4: Payment Standard Changes

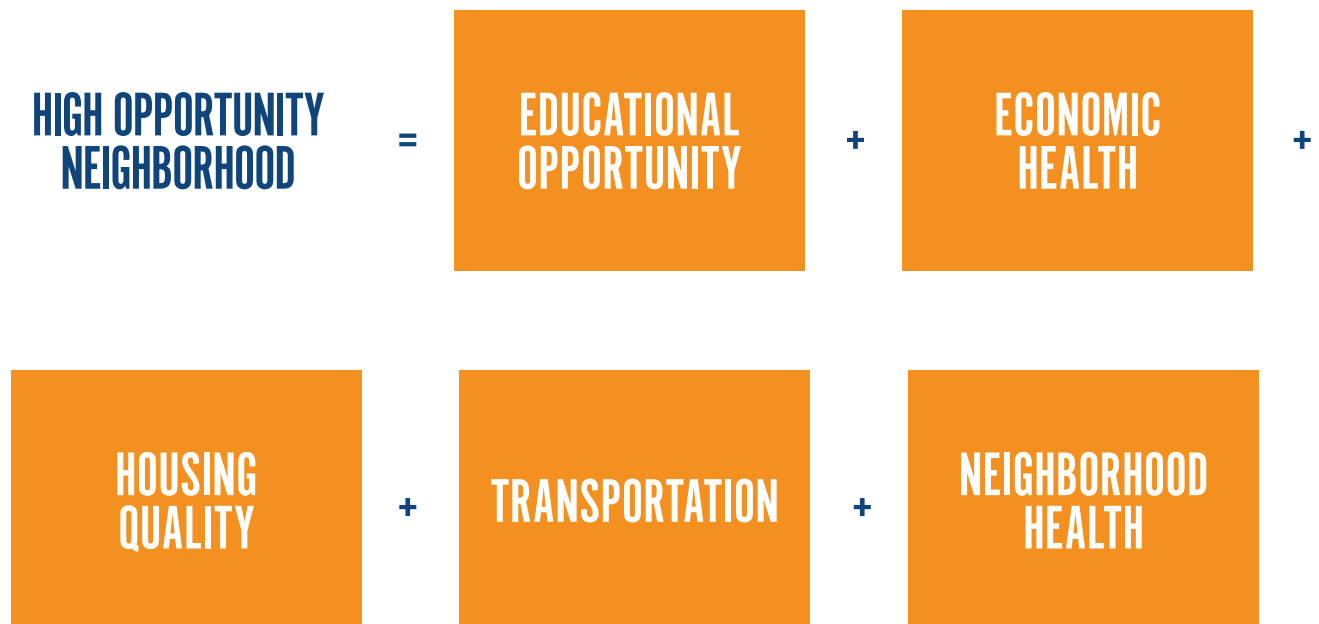
MTW STATUTORY OBJECTIVE: Increase Housing Choice

APPROVAL: 2005

IMPLEMENTED: 2005

CHALLENGE: Currently, 31 percent of KCHA’s tenant-based voucher households live in high-opportunity neighborhoods of King County. These neighborhoods offer benefits to their residents, including improved educational opportunities, increased access to public transportation and greater economic opportunities.⁴² Not surprisingly, high-opportunity neighborhoods have more expensive rents. According to recent market data, a two-bedroom rental unit at the 40th percentile in East King County—typically a high-opportunity area—costs \$506 more than the same unit in South King County, which includes several high-poverty neighborhoods.⁴³ To move to high-opportunity areas, voucher holders need higher subsidy levels, which are not available under traditional payment standards. Conversely, broadly applied payment standards that encompass multiple housing markets—low and high—result in Section 8 rents “leading the market” in lower priced areas.

SOLUTION: This initiative develops local criteria for the determination and assignment of payment standards to better match local rental markets, with the goals of increasing affordability in high-opportunity neighborhoods and ensuring the best use of limited financial resources. We develop our payment standards through an annual analysis of local submarket conditions, trends and projections. This approach means that we can provide subsidy levels sufficient for families to afford the rents in high-opportunity areas of the county and not have to pay market-leading rents in less expensive neighborhoods. As a result, our residents are not squeezed out by tighter rental markets and have greater geographic choice. In 2005, KCHA began applying new payment standards at the time of a resident’s next annual review. In 2007, we expanded this initiative and allowed approval of payment



⁴² Neighborhood opportunity designations are from the Puget Sound Regional Council and Kirwan Institutes’ Opportunity Mapping index (<http://www.psrc.org/growth/growing-transit-communities/regional-equity/opportunity-mapping/>).

⁴³ Dupree & Scott, 2016 King County Rental Data

standards of up to 120 percent of Fair Market Rent (FMR) without HUD approval. In early 2008, we decoupled the payment standards from HUD's FMR calculations entirely so that we could be responsive to the range of rents in Puget Sound's submarkets. Current payment standards for two-bedroom apartments range from 84% to 132% of the regional HUD FMR.

PROGRESS AND OUTCOMES: In 2016, KCHA implemented a five-tiered payment standard system based on ZIP codes. We arrived at a five-tiered approach by analyzing recent tenant lease-up records, consulting local real estate data, holding forums with residents and staff, reviewing other small area FMR payment standard systems implemented by other housing authorities, and assessing the financial implications of various approaches. In designing the new system, we sought to have enough tiers to account for submarket variations but not so many tiers that the new system becomes burdensome and confusing for staff and residents. Early outcomes demonstrate a promising increase in lease-up rates in the high-opportunity neighborhoods located in the top two tiers.

HUD METRICS					
MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0	\$0	\$0	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete the task in staff hours	0 hours	0 hours	0 hours ⁴⁴	Achieved
Increase housing choices	HC # 5: Number of households able to move to an opportunity neighborhood	21% of tenant-based Section 8 households live in high-opportunity neighborhoods	30% of tenant-based Section 8 households live in high-opportunity neighborhoods	31% of tenant-based Section 8 households live in high-opportunity neighborhoods	Exceeded

⁴⁴ This activity is net neutral in terms of hours or dollars saved. Workload remained the same, however the staff changed the timing of when they were applying payment standards.

ACTIVITY 2004-2: Local Project-based Section 8 Program

MTW STATUTORY OBJECTIVE: Increase Cost Effectiveness

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: Current project-basing regulations are cumbersome and present multiple obstacles to serving high-need households, partnering effectively and efficiently with nonprofit developers, and promoting housing options in high-opportunity areas.

SOLUTION: The ability to streamline the process of project-basing Section 8 subsidies is an important tool for addressing the distribution of affordable housing in King County and coordinating effectively with local initiatives. KCHA places project-based Section 8 subsidies in high-opportunity areas of the county in order to increase access to these desirable neighborhoods for low-income households.⁴⁵ We also partner with nonprofit community service providers to create housing targeted to special needs populations, opening new housing opportunities for chronically homeless, mentally ill or disabled individuals, and homeless young adults and families traditionally not served through our mainstream Public Housing and Section 8 programs. Additionally, we coordinate with county government and suburban jurisdictions to underwrite a pipeline of new affordable housing developed by local nonprofit housing providers. MTW flexibility granted by this activity has helped us implement the following policies.

CREATE HOUSING TARGETED TO SPECIAL-NEEDS POPULATIONS BY:

- Assigning Project-based Section 8 (PBS8) subsidy to a limited number of demonstration projects not qualifying under standard policy in order to serve important public purposes. (FY 2004)
- Modifying the definition of “homeless” to include overcrowded households entering transitional housing to align with entry criteria for nonprofit-operated transitional housing. (FY 2004)

SUPPORT A PIPELINE OF NEW AFFORDABLE HOUSING BY:

- Prioritizing assignment of PBS8 assistance to units located in high-opportunity census tracts, including those with poverty rates lower than 20 percent. (FY 2004)

⁴⁵ *Neighborhood opportunity designations are from the Puget Sound Regional Council and Kirwan Institutes' Opportunity Mapping index (<http://www.psrc.org/growth/growing-transit-communities/regional-equity/opportunity-mapping/>).*

CLOSE
TO HALF
OF ALL ALL
KCHA'S
PROJECT-BASED
UNITS

are in areas of
opportunity.

- Waiving the 25 percent cap on the number of units that can be project-based on a single site for transitional, supportive or elderly housing, and for sites with fewer than 20 units. (FY 2004)
- Allocating PBS8 subsidy non-competitively to KCHA-controlled sites and transitional units, or using an existing local government procurement process for project-basing Section 8 assistance. (FY 2004)
- Allowing owners and agents to conduct their own construction and/or rehab inspections, and having the management entity complete the initial inspection rather than KCHA, with inspection sampling at annual review. (FY 2004)
- Modifying eligible unit and housing types to include shared housing, cooperative housing, transitional housing and high-rise buildings. (FY 2004)
- Allowing PBS8 rules to defer to Public Housing rules when used in conjunction with a mixed finance approach to housing preservation or when assigned to a redeveloped former Public Housing property. (FY 2008)

IMPROVE PROGRAM ADMINISTRATION BY:

- Allowing project sponsors to manage project wait lists as determined by KCHA. (FY 2004).
- Using KCHA's standard HCV process for determining Rent Reasonableness for units in lieu of requiring third-party appraisals. (FY 2004)
- Allowing participants in "wrong-sized" units to remain in place and pay the higher rent, if needed. (FY 2004)
- Assigning standard HCV payment standards to PBS8 units, allowing modification with approval of KCHA where deemed appropriate. (FY 2004)
- Offering moves to Public Housing in lieu of a Section 8 HCV exit voucher. (FY 2004)
 - » o Exception: Tenant-based HCV could be provided for a limited period as determined by KCHA in conjunction with internal Public Housing disposition activity. (FY 2012)
- Allowing KCHA to modify the HAP contract to ensure consistency with MTW changes. (FY 2004)
- Using Public Housing preferences for PBS8 units in place of HCV preferences. (FY 2008)
- Allowing KCHA to inspect units at contract execution rather than contract proposal. (FY 2009)
- Modifying the definition of "existing housing" to include housing that could meet Housing Quality Standards within 180 days. (FY 2009)
- Allowing direct owner referral to a PBS8 vacancy when the unit has remained vacant for more than 30 days. (FY 2010)
- Waiving the 20 percent cap on the amount of HCV budget authority that can be project-based, allowing KCHA to determine the size of our PBS8 program. (FY 2010)

PROGRESS AND OUTCOMES: In 2016, we partnered with Bellevue, Redmond and other East King County municipalities to begin development of a local competitive process that pairs PBS8 subsidy, aimed at households earning 30 percent of AMI or less, with local zoning incentives. This process will help ensure that a portion of affordable units set aside through incentive programs are available to extremely low-income households.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved per contract	\$1,980 saved per contract ⁴⁶	\$1,980 saved per contract	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved per contract for RFP	45 hours saved per contract for RFP	45 hours saved per contract for RFP	Achieved
Increase housing choices	HC #3: Average applicant time on wait list in months (decrease)	0 months	29 months	14 months	Exceeded
Increase housing choices	HC #5: Number of households able to move to a better unit and/or neighborhood of opportunity	0 households	45% of project-based units in high-opportunity neighborhoods	50% of project-based units in high-opportunity neighborhoods	Exceeded

ACTIVITY 2004-3: Develop Site-based Waiting Lists

MTW STATUTORY OBJECTIVE: Increase Cost Effectiveness and Housing Choice

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: Under traditional HUD wait list guidelines, an individual can wait more than two-and-a-half years for a Public Housing unit. For many families, this wait is too long. Once a unit becomes available, it might not meet the family's needs or preferences, such as proximity to a child's school or access to local service providers.

SOLUTION: Under this initiative, we have implemented a streamlined waitlist system for our Public Housing program that provides applicants additional options for choosing the location where they want to live. In addition to offering site-based wait lists, we also maintain regional wait lists and have established a list to accommodate the needs of graduates from the region's network of transitional housing facilities for homeless families. In general, applicants are selected for occupancy using a rotation between the site-based, regional and transitional housing applicant pools, based on an equal ratio. Units are not held vacant if a particular wait list is lacking an eligible applicant. Instead, a qualified applicant is pulled from the next wait list in the rotation.

PROGRESS AND OUTCOMES: This streamlined process continued to save an estimated 162 hours of staff time annually.

⁴⁶ This figure was calculated by multiplying the median hourly wage and benefits (\$44) of the staff member who oversees this activity by the number of hours saved. The number is a monetization of the hours saved through the implementation of this program.



HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$4,176 saved ⁴⁷	\$4,698 saved	Exceeded
Reduce costs and achieve greater cost-effectiveness	CE#2: Total time to complete task in staff hours	0 hours saved	144 hours saved	162 hours saved	Exceeded
Increase housing choices	HC #3: Average applicant time on wait list in months (decrease)	0 months	28 months	24 months	Exceeded
Increase housing choices	HC #5: Number of households able to move to a better unit and/or opportunity neighborhood	0% of applicants	100% of Public Housing and Project-based applicants housed from site-based or regional wait lists	100% of Public Housing and Project-based applicants housed from site-based or regional wait lists	Achieved

⁴⁷ This figure was calculated by multiplying the median hourly wage and benefits (\$29) of the staff member who oversees this activity by the number of hours saved. The number is a monetization of the hours saved through the implementation of this program.

ACTIVITY 2004-5: Modified Housing Quality Standards (HQS) Inspection Protocols

MTW STATUTORY OBJECTIVE: Increase Cost Effectiveness

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: HUD's HQS inspection protocols often require multiple trips to the same neighborhood, the use of third-party inspectors and blanket treatment of diverse housing types, adding nearly \$170,000 to annual administrative costs. Follow-up inspections for minor "fail" items impose additional burdens on landlords, who in turn may resist renting to families with Section 8 vouchers.

SOLUTION: Through a series of Section 8 program modifications, we have streamlined the HQS inspection process to simplify program administration, improve stakeholder satisfaction and reduce administrative costs. Specific policy changes include: (1) allowing the release of HAP payments when a unit fails an HQS inspection due to minor deficiencies (applies to both annual and initial move-in inspections); (2) geographically clustering inspections to reduce repeat trips to the same neighborhood or building by accepting annual inspections completed eight to 20 months after initial inspection, allowing us to align inspection of multiple units in the same geographic location; and (3) self-inspecting KCHA-owned units rather than requiring inspection by a third party. KCHA also piloted a risk-based inspection model that places well-maintained, multi-family apartment complexes on a biennial inspection schedule.

PROGRESS AND OUTCOMES: After closely monitoring the outcomes from the risk-based inspection pilot, KCHA decided to expand the program and move all units in multifamily apartment complexes to a biennial inspection schedule. This and the other streamlined processes included in this activity allow KCHA to save more than 5,000 hours of staff time annually.

KCHA's locally-designed HQS policy saved and redirected over

5,000

HOURS OF
STAFF TIME.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0	\$58,000 saved ⁴⁸	\$169,125 saved	Exceeded
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved	1,810 hours saved	5,125 hours saved	Exceeded

ACTIVITY 2004-7: Streamlining Public Housing and Section 8 Forms and Data Processing

MTW STATUTORY OBJECTIVE: Increase Cost Effectiveness

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: Duplicative recertifications, complex income calculations and strict timing rules cause unnecessary intrusions into the lives of the people we serve and expend limited resources for little purpose.

SOLUTION: After analyzing our business processes, forms and verification requirements, we have eliminated or replaced those with little or no value. Through the use of lean engineering techniques, KCHA continues to review office workflow and identify ways that tasks can be accomplished more efficiently and intrude less into the lives of program participants, while still assuring program integrity and quality control. Under this initiative, we have made a number of changes to our business practices and processes for verifying and calculating tenant income and rent.

CHANGES TO BUSINESS PROCESSES:

- Modify Section 8 policy to require notice to move prior to the 20th of the month in order to have paperwork processed during the month. (FY 2004)
- Allow applicant households to self-certify membership in the family at the time of admission. (FY 2004)
- Modify HQS inspection requirements for units converted to project-based subsidy from another KCHA subsidy, and allow the most recent inspection completed within the prior 12 months to substitute for the initial HQS inspection required before entering the HAP contract. (FY 2012)
- Modify standard PBS8 requirements to allow the most recent recertification (within last 12 months) to substitute for the full recertification when tenant's unit is converted to a PBS8 subsidy. (FY 2012)

⁴⁸ This figure was calculated by multiplying the median inspector hourly wage and benefits (\$33) by the number of hours saved. This figure is a monetization of the hours saved through the implementation of this program. Inspectors will instead undertake more auditing and monitoring inspections, assist the fraud investigator, provide landlord trainings, and speed up the timeline for new move-in inspections. It is a monetization of the hours saved through the implementation of this program.

- Allow Public Housing applicant households to qualify for a preference when household income is below 30 percent of AMI. (FY 2004)
- Streamline procedures for processing interim rent changes resulting from wholesale reductions in state entitlement programs. (FY 2011)
- Modify the HQS inspection process to allow streamlined processing of inspection data. (FY 2010)
- Establish a local release form that replaces HUD Form 9986 and is renewed every 40 months. (FY 2014)

CHANGES TO VERIFICATION AND INCOME CALCULATION PROCESSES:

- Exclude payments made to a landlord by the state Department of Social and Health Services (DSHS) on behalf of a tenant from the income and rent calculation under the Section 8 program. (FY 2004)
- Allow Section 8 residents to self-certify income of \$50 or less received as a pass-through DSHS childcare subsidy. (FY 2004)
- Extend to 180 days the term over which verifications are considered valid. (FY 2008)
- Modify the definition of “income” to exclude income from assets with a value less than \$50,000, and income from Resident Service Stipends less than \$500 per month. (FY 2008)
- Apply any decrease in Payment Standard at the time of the next annual review or update, rather than using HUD’s two-year phase-in approach. (FY 2004)
- Allow Section 8 residents who are at \$0 HAP to self-certify income at the time of review. (FY 2004)

PROGRESS AND OUTCOMES: These streamlined processes save the agency an estimated 2,000 hours in staff time each year.

HUD METRICS					
MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0	\$58,000 saved ⁴⁹	\$58,000 saved	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete the task in staff hours	0 hours saved	2,000 hours saved	2,000 hours saved	Achieved

⁴⁹ This figure was calculated by multiplying the median Property Management Specialist hourly wage and benefits (\$29) by the number of hours saved. It is a monetization of the hours saved through the implementation of this program.

ACTIVITY 2004-9: Rent Reasonableness Modifications

MTW STATUTORY OBJECTIVE: Increase Cost Effectiveness

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: Under current HUD regulations, a housing authority must perform an annual Rent Reasonableness review for each voucher holder. If a property owner is not requesting a rent increase, however, the rent does not fall out of federal guidelines and does not necessitate a review.

SOLUTION: KCHA now performs Rent Reasonableness determinations only when a landlord requests an increase in rent. Under standard HUD regulations, a Rent Reasonableness review is required annually in conjunction with each recertification completed under the program. After reviewing this policy, we found that if an owner had not requested a rent increase, it was unlikely the current rent fell outside of established guidelines. In response to this analysis, KCHA eliminated an annual review of rent levels. By bypassing this burdensome process, we intrude in the lives of residents less and can redirect our resources to more pressing needs. Additionally, KCHA performs Rent Reasonableness inspections at our own properties, rather than contracting with a third party, allowing us to save additional resources.

PROGRESS AND OUTCOMES: With the elimination of this non-essential regulation, KCHA has been able to adopt a policy that is less disruptive to residents while saving an estimated 1,000 hours in staff time each year.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$33,000 saved ⁵⁰	\$33,000 saved	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 staff hours saved	1,000 staff hours saved	1,000 staff hours saved	Achieved

⁵⁰ This figure was calculated by multiplying the median Inspector hourly wage and benefits (\$33) by the number of hours saved. These positions are not eliminated so this is a hypothetical estimate of the amount that could be saved in staff hours by implementing this activity. Inspectors will instead undertake more auditing and monitoring inspections, assist the fraud investigator, provide landlord trainings, and perform new move-in inspections. It is a monetization of the hours saved through the implementation of this program.

ACTIVITY 2004-12: Energy Service Companies (ESCo) Development

MTW STATUTORY OBJECTIVE: Increase Cost-effectiveness

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: KCHA could recapture up to \$48 million in energy savings over 20 years if provided the upfront investment necessary to make efficiency upgrades to its aging housing stock.

SOLUTION: KCHA employs energy conservation measures and improvements through the use of Energy Performance Contracts (EPC)—a financing tool that allows PHAs to make needed energy upgrades without having to self-fund the upfront necessary capital expenses. The energy services partner identifies these improvements through an investment-grade energy audit that is then used to underwrite loans to pay for the measures. Project expenses, including debt service, are then paid for out of the energy savings while KCHA and our residents receive the long-term savings and benefits. Upgrades may include: installation of energy-efficient light fixtures, solar panels, and low-flow faucets, toilets and showerheads; upgraded appliances and plumbing; and improved irrigation and HVAC systems.

PROGRESS AND OUTCOMES: In 2016, we extended the existing EPC for an additional eight years and implemented a new 20-year EPC with Johnson Controls (JCI) for both incremental and existing Public Housing properties to make needed capital improvements.

HUD METRICS

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$800,000 saved	\$1,400,000 saved	Exceeded

ACTIVITY 2004-16: Section 8 Occupancy Requirements

MTW STATUTORY OBJECTIVE: Increase Cost-effectiveness

APPROVAL: 2004

IMPLEMENTED: 2004

CHALLENGE: More than 20 percent of tenant-based voucher households move two or more times while receiving subsidy. Moves can be beneficial for the household if they lead to gains in neighborhood or housing quality, but moves also can be burdensome because they incur the costs of finding a new unit through application fees and other moving expenses. KCHA also incurs additional costs in staff time through processing moves and working with families to locate a new unit.

SOLUTION: Households may continue to live in their current unit when their family size exceeds the standard occupancy requirements by just one member. Under standard guidelines, a seven-person household living in a three-bedroom unit would be considered overcrowded and thus be required to move to a larger unit. Under this modified policy, the family may remain voluntarily in its current unit, avoiding the costs and disruption of moving.

This initiative reduces the number of processed annual moves, increases housing choice among these families, and reduces our administrative and HAP expenses.

PROGRESS AND OUTCOMES: By eliminating this rule, KCHA saves an estimated 465 hours in staff time each year while helping families avoid the disruption and costs of a move

HUD METRICS					
MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK	OUTCOME	BENCHMARK ACHIEVED?
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0	\$8,613 saved ⁵¹	\$15,345 saved	Achieved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved per file	87 hours saved	465 hours saved ⁵²	Exceeded
Number of households at or below 80% AMI that would lose assistance or need to move	193 households	150 households	0 households	0 households	Achieved

⁵¹ This dollar figure was calculated by multiplying the median Property Management Specialist hourly wage and benefits (\$33) by the number of hours saved.

⁵² According to current program data, 155 families currently exceed the occupancy standard. At three hours saved per file, we estimate that KCHA continues to save 465 hours annually.



B. NOT YET IMPLEMENTED ACTIVITIES

Activities listed in this section are approved but have not yet been implemented.

ACTIVITY 2016-1: Budget-based Rent Model

APPROVAL: 2016

This activity allows KCHA to adopt a budget-based approach to calculating the contract rent at its Project-based Section 8 developments. Traditionally, HUD requires that PHAs set rent in accordance with Rent Reasonableness statutes. These statutes require that a property's costs reflect the average costs of a comparable building in the same geographic region at a particular point in time. However, a property's needs and purpose can change over time. This set of rules does not take into consideration variations in costs, which might include added operational expenses, necessary upgrades and increased debt service to pay for renovations. Consider an aging former Public Housing development utilizing Project-based Section 8 rental subsidies that is nearing the end of its useful life and in need of capital upgrades. Under current rules, this property could not achieve a rent structure high enough to support the capital improvements and debt service necessary to extend its life as a Project-based Section 8 development.

This budget-based rent model allows KCHA to create an appropriate annual budget for each property from which a reasonable, cost-conscious rent level would derive. These budgets may set some units above the Rent Reasonableness rent level and in that case, KCHA will contribute more toward the rent, not to exceed 120 percent of the payment standard. The calculation of a resident's rent payment does not change as it is still determined by that resident's income level. KCHA offsets any increase in a resident's portion of rent, allowing a property to support debt without any undue burden on residents.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Increase housing choices for low-income families	HC #2: Units of Housing Preserved	0 units	700 units ⁵³

ACTIVITY 2015-1: Flat Subsidy for Local, Non-traditional Housing Programs

APPROVAL: 2015

This activity provides a flat, per-unit subsidy in lieu of monthly Housing Assistance Payments (HAP) and allows the service provider to dictate the terms of the tenancy (such as length of stay and the tenant portion of rent). The funding would be block-granted based on the number of units authorized under contract and occupied in each program. This flexibility would allow KCHA to better support a "Housing First" approach that places high-risk homeless populations in supportive housing programs tailored to nimbly meet an individual's needs. The policy faced a delay in implementation in 2016 on behalf of the service provider partner and should be implemented in 2017.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$13,266 ⁵⁴ saved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved	402 hours saved
Reduce costs and achieve greater cost-effectiveness	CE #3: Average error rate in completing a task as a percentage	TBD	TBD
Reduce costs and achieve greater cost-effectiveness	CE #4: Amount of funds leveraged in dollars	\$0 leveraged	TBD

⁵³ Includes 509 units from KCHA's "509" Initiative and as many as 262 units at Birch Creek.

⁵⁴ This figure was calculated by multiplying the median hourly wage and benefits (\$33) of the staff member who oversees this activity by the number of hours saved. This number represents a hypothetical estimate of the dollar amount that could be saved in staff hours by implementing this activity.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Increase housing choice	HC #7: Number of households receiving services aimed to increase housing choice	0 households	67 households
Increase self-sufficiency	SS #8: Households transition to self-sufficiency	0 households	TBD

ACTIVITY 2015-2: Reporting on the Use of Net Proceeds from Disposition Activities

APPROVAL: 2015

CHALLENGE: The reporting process for the use of net proceeds from KCHA's disposition activities is duplicative and burdensome, taking up to 160 hours to complete each year. The reporting protocol for the MTW program aligns with the Section 18 disposition code reporting requirements, allowing for an opportunity to simplify this process.

SOLUTION: KCHA reports on the use of net proceeds from disposition activities in the annual MTW report. This streamlining activity allows us to realize time-savings and administrative efficiencies while continuing to adhere to the guidelines outlined in 24 CFR 941 Subpart F of Section 18 demolition and disposition code.

We use our net proceeds from the last HOPE VI disposition, Seola Gardens, in some of the following ways, all of which are accepted uses under Section 18(a)(5):

1. Repair or rehabilitation of existing ACC units.
2. Development and/or acquisition of new ACC units.
3. Provision of social services for residents.
4. Implementation of a preventative and routine maintenance strategy for specific single-family scattered-site ACC units.
5. Modernization of a portion of a residential building in our inventory to develop a recreation room, laundry room or day-care facility for residents.
6. Leveraging of proceeds in order to partner with a private entity for the purpose of developing mixed-finance Public Housing under 24 CFR 905.604.

We report on the proceeds' uses, including administrative and overhead costs, in the MTW reports. The net proceeds from this project are estimated to be \$5 million.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	\$11,840 ⁵⁵ saved
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete task in staff hours	0 hours saved	160 hours saved

ACTIVITY 2010-1: Supportive Housing for High-need Homeless Families

APPROVAL: 2010

This activity is a demonstration program for up to 20 households in a project-based Family Unification Program (FUP)-like environment. The demonstration program currently is deferred, as our program partners opted for a tenant-based model this upcoming fiscal year. It might return in a future program year, however.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Increase self-sufficiency	SS #8: Number of households transitioned to self-sufficiency ⁵⁶	0 households	75% have maintained housing for one year or longer

ACTIVITY 2010-9: Limit Number of Moves for a Section 8 Participant

APPROVAL: 2010

This policy aims to increase family and student classroom stability and reduce program administrative costs by limiting the number of times an HCV participant can move per year or over a set time. Reducing household and classroom relocations during the school year is currently being addressed through a counseling pilot. This activity is currently deferred for consideration in a future year, if the need arises.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Reduce costs and achieve greater cost-effectiveness	CE #1: Total cost of task in dollars	\$0 saved	TBD
Reduce costs and achieve greater cost-effectiveness	CE #2: Total time to complete the task in staff hours	0 hours saved	TBD

⁵⁵ This figure was calculated by multiplying the median hourly wage and benefits (\$74) of the staff member who oversees this activity by the number of hours saved. This number represents a hypothetical estimate of the dollar amount that could be saved in staff hours by implementing this activity.

⁵⁶ Self-sufficiency is defined as maintaining housing for a significant period of time.



ACTIVITY 2010-11: Incentive Payments to Section 8 Participants to Leave the Program

APPROVAL: 2010

KCHA may offer incentive payments to families receiving less than \$100 per month in HAP to voluntarily withdraw from the program. This activity is not currently needed in our program model but may be considered in a future fiscal year.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Increase self-sufficiency	SS #8: Number of households transitioned to self-sufficiency ⁵⁷	0 households	TBD

⁵⁷ Self-sufficiency is defined as successful transition to unsubsidized housing.

ACTIVITY 2008-3: FSS Program Modifications

APPROVAL: 2008

KCHA is exploring possible modifications to the FSS program that could increase incentives for resident participation and income growth. These outcomes could pave the way for residents to realize a higher degree of economic independence. The program currently includes elements that unintentionally act as disincentives by punishing higher income-earners, the very residents who could benefit most from additional incentives to exit subsidized housing programs. To address these issues, KCHA is considering modifying the escrow calculation so as to not unintentionally punish higher earning households.

This activity continued to be on hold in 2016 but changes to the program could take place in 2017.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Increase self-sufficiency	SS #1: Average earned income of households in dollars	TBD	TBD
Increase self-sufficiency	SS #2: Average amount of savings/escrow in dollars	TBD	TBD
Increase self-sufficiency	SS #3: Employment status for heads of household	TBD	TBD
Increase self-sufficiency	SS #4: Number of households receiving TANF assistance	TBD	TBD
Increase self-sufficiency	SS #5: Households assisted by services that increase self-sufficiency	TBD	TBD
Increase self-sufficiency	SS #6: Average amount of Section 8 and/or Section 9 subsidy per household	TBD	TBD
Increase self-sufficiency	SS #7: Tenant rent share	TBD	TBD
Increase self-sufficiency ⁵⁸	SS #8: Households transitioned to self-sufficiency	TBD	TBD

⁵⁸ Self-sufficiency is defined as successful transition to unsubsidized housing.

ACTIVITY 2008-5: Allow Limited Double Subsidy between Programs (Project-based Section 8/Public Housing/Housing Choice Vouchers)

APPROVAL: 2008

This policy change facilitates program transfers in limited circumstances, increases landlord participation and reduces the impact on the Public Housing program when tenants transfer. Following the initial review, this activity was placed on hold for future consideration.

MTW STATUTORY OBJECTIVE	UNIT OF MEASUREMENT	BASELINE	BENCHMARK
Increase housing choices	HC #4: Number of households at or below 80% AMI that would lose assistance or need to move	0 households	TBD

C. ACTIVITIES ON HOLD

None

D. CLOSED-OUT ACTIVITIES

Activities listed in this section are closed out, meaning they never have been implemented, that we do not plan to implement them in the future, or that they are completed or obsolete.

ACTIVITY 2013-3: Short-term Rental Assistance Program

APPROVAL: 2013

CLOSEOUT YEAR: 2015

In partnership with the Highline School District, KCHA implemented a program called the Student and Family Stability Initiative (SFSI), a Rapid Re-housing demonstration program. Using this evidence-based approach, our program pairs short-term rental assistance with housing stability and employment connection services for families experiencing or on the verge of homelessness. This activity is ongoing but has been combined with Activity 2013-2: Flexible Rental Assistance as the program models are similar and enlist the same MTW flexibilities.

ACTIVITY 2012-4: Supplemental Support for the Highline Community Healthy Homes Project

APPROVAL: 2012

CLOSEOUT YEAR: 2012

This project provided supplemental financial support to low-income families not otherwise qualified for the Healthy Homes project but who required assistance to avoid loss of affordable housing. This activity is completed. An evaluation of the program by Breyse et al was included in KCHA's 2013 Annual MTW Report.

ACTIVITY 2011-2: Redesign the Sound Families Program

APPROVAL: 2011

CLOSEOUT YEAR: 2014

KCHA developed an alternative model to the Sound Families program that combines HCV funds with DSHS funds. The goal was to continue the support of at-risk, homeless households in a FUP-like model after the completion of the Sound Families demonstration. This activity is completed and the services have been incorporated into our existing conditional housing program.

ACTIVITY 2011-1: Transfer of Public Housing Units to Project-based Subsidy

APPROVAL: 2011

CLOSEOUT YEAR: 2012

By transferring Public Housing units to Project-based subsidy, KCHA preserved the long-term viability of 509 units of Public Housing. By disposing these units to a KCHA-controlled entity, we were able to leverage funds to accelerate capital repairs and increased tenant mobility through the provision of tenant-based voucher options to existing Public Housing residents. This activity is completed.

ACTIVITY 2010-10: Implement a Maximum Asset Threshold for Program Eligibility

APPROVAL: 2010

CLOSEOUT YEAR: 2016

This activity limits the value of assets that can be held by a family in order to obtain (or retain) program eligibility. This policy is no longer under consideration.

ACTIVITY 2010-2: Resident Satisfaction Survey

APPROVAL: 2010

CLOSEOUT YEAR: 2010

KCHA developed an internal Satisfaction Survey in lieu of a requirement to comply with the Resident Assessment Subsystem portion of HUD's Public Housing Assessment System. Note: KCHA continues to survey Public Housing households, Section 8 households and Section 8 landlords on an ongoing basis.

ACTIVITY 2009-2: Definition of Live-in Attendant

APPROVAL: 2009

CLOSEOUT YEAR: 2014

In 2009, KCHA considered a policy change that would redefine who is considered a "Live-in Attendant." This policy is no longer under consideration.

ACTIVITY 2008-17: Income Eligibility and Maximum Income Limits

APPROVAL: 2008

CLOSEOUT YEAR: 2016

This policy would cap the income that residents may have and also still be eligible for KCHA programs. Income limits might be considered in future years if the WIN Rent policy does not efficiently address client needs. This policy is no longer under consideration.

ACTIVITY 2008-6: Performance Standards

APPROVAL: 2008

CLOSEOUT YEAR: 2014

In 2008, KCHA investigated the idea of developing performance standards and benchmarks to evaluate the MTW program. We worked with other MTW agencies in the development of the performance standards now being field-tested across the country. This activity is closed out as KCHA continues to collaborate with other MTW agencies on industry metrics and standards.

ACTIVITY 2008-4: Combined Program Management

APPROVAL: 2008

CLOSEOUT YEAR: 2009

This activity streamlined program administration through a series of policy changes that ease operations of units converted from Public Housing to project-based Section 8 subsidy or those located in sites supported by mixed funding streams. Note: KCHA may further modify our combined program management to streamline administration and increase tenant choice.

ACTIVITY 2007-9: Develop a Local Asset Management Funding Model

APPROVAL: 2007

CLOSEOUT YEAR: 2007

This activity streamlined current HUD requirements to track budget expenses and income down to the Asset Management Project level. This activity is completed.

ACTIVITY 2007-8: Remove Cap on Voucher Utilization

APPROVAL: 2007

CLOSEOUT YEAR: 2014

This initiative allows us to award Section 8 assistance to more households than permissible under the HUD-established baseline. Our savings from a multi-tiered payment standard system, operational efficiencies, and other policy changes have been critical in helping us respond to the growing housing needs of the region's extremely low-income households. Despite ongoing uncertainties around federal funding levels, we intend to continue to use MTW program flexibility to support housing voucher issuance levels above HUD's established baseline. This activity is no longer active as agencies are now permitted to lease above their ACC limit.

ACTIVITY 2007-4: Section 8 Applicant Eligibility

APPROVAL: 2007

CLOSEOUT YEAR: 2007

This activity increased program efficiency by removing eligibility for those currently on a federal subsidy program.

ACTIVITY 2007-18: Resident Opportunity Plan (ROP)

APPROVAL: 2007

CLOSEOUT YEAR: 2015

An expanded and locally designed version of FSS, ROP's mission was to advance families toward self-sufficiency through the provision of case management, supportive services and program incentives, with the goal of positive transition from Public Housing or Section 8 into private market rental housing or home ownership. KCHA implemented this five-year pilot in collaboration with community partners, including Bellevue College and the YWCA. These partners provided education and employment-focused case management, such as individualized career planning, a focus on wage progression and asset-building assistance. In lieu of a standard FSS escrow account, each household received a monthly deposit into a savings account, which continues throughout program participation. Deposits to the household savings account are made available to residents upon graduation from Public Housing or Section 8 subsidy. After reviewing the mixed outcomes from the multi-year evaluation, KCHA decided to close out the program and re-evaluate the best way to assist families in achieving economic independence.

ACTIVITY 2006-1: Block Grant Non-mainstream Vouchers

APPROVAL: 2006

CLOSEOUT YEAR: 2006

This policy change expanded KCHA's MTW Block Grant by including all non-mainstream program vouchers. This activity is completed.

ACTIVITY 2005-18: Modified Rent Cap for Section 8 Participants

APPROVAL: 2005

CLOSEOUT YEAR: 2005

This modification allowed a tenant's portion of rent to be capped at up to 40 percent of gross income upon initial lease-up rather than 40 percent of adjusted income. Note: KCHA may implement a rent cap modification in the future to increase mobility.

ACTIVITY 2004-8: Resident Opportunities and Self-Sufficiency (ROSS) Grant Homeownership

APPROVAL: 2004

CLOSEOUT YEAR: 2006

This grant funded financial assistance through MTW reserves with rules modified to fit local circumstances, modified eligibility to include Public Housing residents with HCV, required minimum income and minimum savings prior to entry, and expanded eligibility to include more than first-time homebuyers. This activity is completed.

A photograph of a man wearing a yellow hard hat and safety glasses, working on a wall with a vent. He is holding a tool and appears to be in the process of installing or repairing the vent. The image is overlaid with a large orange rectangle containing the section header text.

V. SOURCES AND USES OF MTW FUNDS

A. SOURCES AND USES OF MTW FUNDS

Actual Sources and Uses of MTW Funding for the Fiscal Year

In accordance with the requirements of this report, KCHA has submitted our unaudited information in the pre-scribed FDS file format through the Financial Assessment System—PHA (FASPHA). The audited FDS will be submitted in September 2017.

Activities that Used Only MTW Single-fund Flexibility

KCHA is committed to making the most efficient, effective and creative use of our single-fund flexibility under MTW while adhering to the statutory requirements of the program. Our ability to blend funding sources gives us the freedom to implement new approaches to program delivery in response to the varied and challenging housing needs of low-income people in the Puget Sound region. With MTW flexibility, we have assisted more of our county's households—and, among those, more of the most vulnerable and poorest households—than would have been possible under HUD's traditional funding and program constraints.

KCHA's MTW initiatives, described below, demonstrate the value and effectiveness of single-fund flexibility in practice:

- **KCHA'S HOMELESS HOUSING INITIATIVES.** These initiatives address the varied and diverse needs of the county's most vulnerable homeless populations—those experiencing chronic mental illness; individuals with criminal justice involvement; homeless young adults and foster youth; homeless students and their families; and

KCHA dedicated
more than

\$1.6M

**MILLION TO
HOMELESS
HOUSING
PROGRAMS
IN 2016.**

people escaping domestic violence. The traditional housing subsidy programs have failed to reach many of these households and lack the supportive services necessary to successfully serve these individuals and families. In 2016, KCHA invested \$1,668,788 of MTW funds into these programs.

- **HOUSING STABILITY FUND.** This fund provided emergency financial assistance to qualified residents to secure and keep housing, including limited rental assistance, security deposits and utility support. Under the program design, a designated agency partner disburses funding to qualified program participants, screening for eligibility according to the program's guidelines. In 2016, we assisted 40 households with emergency grants totaling \$40,000 through the Housing Stability Fund. As a result of this assistance, all 40 families were able to maintain their housing, avoiding the far greater safety-net costs that would have occurred if they became homeless.
- **EDUCATION INITIATIVES.** KCHA continued to actively partner with local education stakeholders to improve outcomes for the 14,700 children who lived in our federally assisted housing. The results of these efforts, including improved attendance, and increases in grade-level performance and on-time graduation, are an integral part of our core mission. By investing in the next generation, we are working to close the cycle of poverty that persists among many of the families we serve.
- **REDEVELOPMENT OF DISTRESSED PUBLIC HOUSING.** With MTW's single-fund flexibility, KCHA continued to undertake the repairs necessary to preserve more than 3,400 units of federally subsidized housing KCHA owns over the long term.⁵⁹ This flexibility enabled effective use of the initial and second five-year increments of Replacement Housing Factor (RHF) funds from the former Springwood and Park Lake I and II developments. Following HUD disposition approval in 2012, KCHA is successfully addressing the substantial deferred maintenance needs of 509 former Public Housing units in 22 different communities. Utilizing MTW flexibility, we have transitioned these properties to the Project-based Section 8 program and used the cash flow to leverage \$18 million from the Federal Home Loan Bank (FHLB) on extremely favorable terms. As the FHLB requires such loans be fully collateralized by cash, investments and/or the underlying mortgage on the properties, we continue to use a portion of our MTW working capital as collateral for this loan. At the end of 2016, \$25 million in capital activities had been completed at these developments.
- **ACQUISITION AND PRESERVATION OF AFFORDABLE HOUSING.** We continued to use MTW resources to preserve affordable housing at risk of loss to private redevelopment.

⁵⁹ Sites with significant revitalization activity: Park Lake I and II, Springwood, the Egis senior developments, 509 scattered sites, and Green River.

- **LONG-TERM VIABILITY OF OUR PORTFOLIO.** KCHA used our single-fund flexibility to protect the long-term viability of our inventory. This flexibility allowed us to make loans in combination with the Low Income Housing Tax Credit (LIHTC) to rehabilitate properties, adding years to their useful lives. Additionally, we continued to use a short-term line of credit toward the redevelopment of the Greenbridge HOPE VI site, which will be retired with proceeds from land sales to private homebuilders, much of which is already underway. KCHA also used MTW funds to support energy conservation measures as part of our EPC projects. MTW working capital provided an essential backstop for these types of liabilities, addressing risk concerns of lenders, enhancing our credit worthiness and enabling our continued access to private capital markets.
- **REMOVE THE CAP ON VOUCHER UTILIZATION.** This initiative enabled us to utilize savings achieved through MTW initiatives to overlease and provide Housing Choice Voucher assistance to more households than permissible under our HUD-established baseline. Our savings from a multi-tiered, ZIP code-based payment standard system, operational efficiencies and other policy changes have been critical in helping us respond to the growing housing needs of the region's extremely low-income households. Despite ongoing uncertainties around federal funding levels, we continued to use MTW program flexibility to support housing voucher issuance above HUD baseline levels.

B. LOCAL ASSET MANAGEMENT PLAN

Has the PHA allocated costs within statute during the plan year?	No
Has the PHA implemented a Local Asset Management Plan (LAMP)?	Yes
Has the PHA provided a LAMP in the appendix?	Yes

In FY 2008, as detailed in the MTW Annual Plan for that year and adopted by our Board of Commissioners under Resolution No. 5116, KCHA developed and implemented our own local funding model for Public Housing and Section 8 using our MTW block grant authority. Under our current agreement, KCHA's Public Housing Operating, Capital and Section 8 HCV funds are considered fungible and may be used interchangeably. In contrast to 990.280 regulations, which require transfers between projects only after all project expenses are met, KCHA's model allows budget-based funding at the start of the fiscal year from a central ledger. We maintain a budgeting and accounting system that gives each property sufficient funds to support annual operations, including allowable fees. Actual revenues include those provided by HUD and allocated by KCHA based on annual property-based budgets. As envisioned, all block grants are deposited into a single general ledger fund.

In 2016, KCHA
leased more than

130

VOUCHERS
ABOVE HUD'S
FUNDING
BASELINE.



VI. ADMINISTRATIVE

A. HUD REVIEWS, AUDITS OR PHYSICAL INSPECTION ISSUES

The results of HUD's monitoring visits, physical inspections and other oversight activities have not identified any deficiencies. The average REAC score for KCHA's public housing inventory in 2016 was 97.2 per cent.

B. RESULTS OF LATEST KCHA-DIRECTED EVALUATIONS

We continued to expand and enhance our internal research and evaluation capacities in 2016. Our research staff completed a summary analysis of the recently closed out Resident Opportunity Plan (ROP) program. KCHA also contracted with the Urban Institute to conduct an assessment of SFSI, our short-term rental assistance program that targets homeless families and children enrolled in the Highline School District. The assessment will provide KCHA with a better understanding of fidelity to program design and three years of program outcomes in enabling families with children to achieve housing and school stability. In 2016, we also advanced data-sharing partnerships with the University of Washington (to explore residents' mobility and geographic patterns) and the Seattle-King County Public Health Department (to understand health and housing intersections). Finally, we continued to analyze outcomes from KCHA's educational initiatives through two reports: a mid-program summary of the GLEA Early Learning program and a synthesis of interviews conducted with the partners engaged in our three educational pilots.

Reports for each of these evaluation and research activities can be found attached in Appendix B.



CERTIFICATION OF STATUTORY COMPLIANCE

On behalf of the King County Housing Authority (KCHA), I certify that the Agency has met the three statutory requirements of the Restated and Amended Moving to Work Agreement entered into between the Department of Housing and Urban Development (HUD) and KCHA on March 13, 2009. Specifically, KCHA has adhered to the following requirements of the MTW demonstration during FY 2015:

- At least 75 percent of the families assisted by KCHA are very low-income families, as defined in section 3(b)(2) of the 1937 Act;
- KCHA has continued to assist substantially the same total number of eligible low-income families as would have been served absent participation in the MTW demonstration; and
- KCHA has continued to serve a comparable mix of families (by family size) as would have been served without MTW participation.



STEPHEN J. NORMAN
Executive Director

March 15, 2017

DATE

A. KCHA'S LOCAL ASSET MANAGEMENT PLAN

As detailed in KCHA's FY 2008 MTW Annual Plan and adopted by the Board of Commissioners under Resolution No. 5116, KCHA has implemented a Local Asset Management Plan that considers the following:

- KCHA will develop its own local funding model for Public Housing and Section 8 using its block grant authority. Under its current agreement, KCHA can treat these funds and CFP dollars as fungible. In contrast to 990.280 regulations, which require transfers between projects after all project expenses are met, KCHA's model allows budget-based funding at the start of the fiscal year from a central ledger, not other projects. KCHA will maintain a budgeting and accounting system that gives each property sufficient funds to support annual operations, including allowable fees. Actual revenues will include those provided by HUD and allocated by KCHA based on annual property-based budgets. As envisioned, all block grants will be deposited into a single general ledger fund. This will have multiple benefits.
 - » KCHA gets to decide subsidy amounts for each public housing project. It's estimated that HUD's new funding model has up to a 40% error rate for individual sites. This means some properties get too much, some too little. Although funds can be transferred between sites, it's simpler to determine the proper subsidy amount at the start of the fiscal year rather than when shortfalls develop. Resident services costs will be accounted for in a centralized fund that is a sub-fund of the single general ledger, not assigned to individual programs or properties.
 - » KCHA will establish a restricted public housing operating reserve equivalent to two months' expenses. KCHA will estimate subsidies and allow sites to use them in their budgets. If the estimate exceeds the actual subsidy, the difference will come from the operating reserve. Properties may be asked to replenish this central reserve in the following year by reducing expenses, or KCHA may choose to make the funding permanent by reducing the unrestricted block grant reserve.
 - » Using this approach will improve budgeting. Within a reasonable limit, properties will know what they have to spend each year, allowing them autonomy to spend excess on "wish list" items and carefully watch their budgets. The private sector doesn't wait until well into its fiscal year to know how much revenue is available to support its sites.
- Reporting site-based results is an important component of property management and KCHA will continue accounting for each site separately; however, KCHA, as owner of the properties will determine how much revenue will be included as each project's subsidy. All subsidies will be properly accounted for under the MTW rubric.

- Allowable fees to the central office cost center (COCC) will be reflected on the property reports, as required. The MTW ledger won't pay fees directly to the COCC. As allowable under the asset management model, however, any subsidy needed to pay legacy costs, such as pension or terminal leave payments and excess energy savings from the Authority's ESCO, may be transferred from the MTW ledger or the projects to the COCC.
- Actual Section 8 amounts needed for housing assistance payments and administrative costs will be allotted to the Housing Choice Voucher program, including sufficient funds to pay asset management fees. Block grant reserves and their interest earnings will not be commingled with Section 8 operations, enhancing budget transparency. Section 8 program managers will become more responsible for their budgets in the same manner as public housing site managers.
- Block grant ledger expenses, other than transfers out to sites and Section 8, will be those that support MTW initiatives, such as the South County Pilot or resident self-sufficiency programs. Isolating these funds and activities will help KCHA's Board of Commissioners and its management keeps track of available funding for incremental initiatives and enhances KCHA's ability to compare current to pre-MTW historical results with other housing authorities that do not have this designation.
- In lieu of multiple submissions of Operating Subsidy for individual Asset Management Projects, KCHA may submit a single subsidy request using a weighted average project expense level (WAPEL) with aggregated utility and add-on amounts.

B. KCHA-DIRECTED EVALUATIONS

We continued to expand and enhance our internal research and evaluation capacities in 2016. Our research staff completed a summary analysis of the recently closed out Resident Opportunity Plan (ROP) program. KCHA also advanced data-sharing partnerships with the University of Washington (to explore residents' mobility and geographic patterns) and the Seattle-King County Public Health Department (to understand health and housing intersections). Finally, we continued to analyze outcomes from KCHA's educational initiatives through two reports: a mid-program summary of the GLEA Early Learning program and a synthesis of interviews conducted with the partners engaged in our three educational pilots.

Reports for each of these evaluation and research activities can be found attached in Appendix B.

RESIDENT OPPORTUNITY PLAN

Initiative Summary

OCTOBER 2016

PREPARED FOR

King County Housing Authority, Resident Services Department

PREPARED BY

King County Housing Authority, Department of Policy and Research

REPORT OVERVIEW

This report provides an overview of the Resident Opportunity Plan (ROP), a self-sufficiency initiative of the King County Housing Authority designed to improve residents' financial circumstances with the intent to enable them to move out of subsidized housing. The ROP initiative was active from 2009 to 2015. This report includes data points through October 1, 2016.



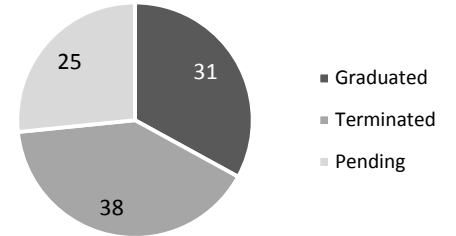
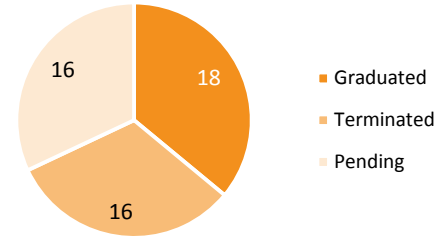
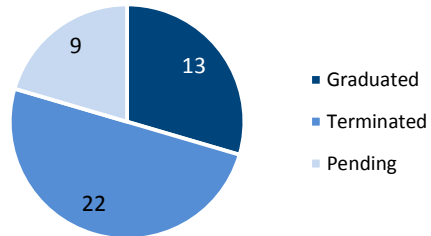
RESIDENT OPPORTUNITY PLAN AT A GLANCE

Bellevue College | n = 44

YWCA | n = 50

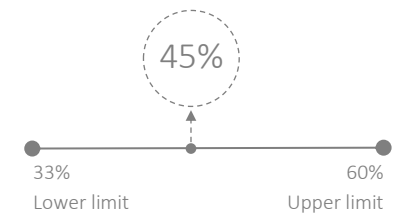
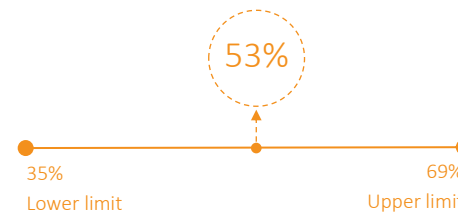
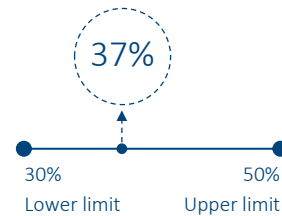
Total | n = 94

Program Status*



Graduation Rate Range

- Circled value[†]
- Lower/upper limits dependent on outcome of pending participants



Cost Per Participant[†]

\$15,213

\$16,781

\$15,974

Median Program Duration for Graduates[#] (in years)

4.4

2.9

3.3

Median ROP Account Value[#]

\$9,000

\$6,600

\$7,800

* As of October 1, 2016

[†] Based on participants for which participation has ended (i.e. graduated or terminated)

[#] Based on graduated households

Overview of the Resident Opportunity Plan (ROP)

In 2009, the King County Housing Authority (KCHA) developed ROP, a pilot initiative designed to **empower residents to move out of subsidized housing through focused activities related to income growth, skill development and asset building**. The initiative enrolled 94 participants during its 6 ½ years of operation between 2009 and 2015.

Criteria for Enrollment

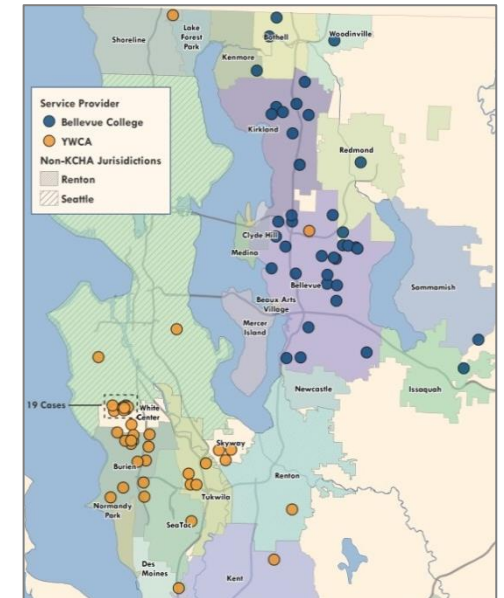
The program identified participants through a combination of criteria:

- **Geography:** Outreach was focused to residents of the Park Lake Homes Site II property in White Center who were relocated with KCHA's planned rehabilitation of the property (now Seola Gardens), as well as to public housing or Housing Choice Voucher residents within the cities of Bellevue or Kirkland. In 2012, these geographic criteria were expanded to include the regions of East/North and Southwest King County more broadly.
- **Workability:** At time of referral, residents needed to demonstrate a commitment to full-time employment through one of three methods: i) current full-time employment, ii) prior full-time employment within the past year, or iii) demonstrated interest in developing a career plan as evidenced by enrollment in or recent completion of a training /college program.
- **Rental history:** Residents could not owe back rent to KCHA, and had to have demonstrated history of consistent on-time rental payments for a period of 12-months.
- **Criminal history:** Residents could not have engaged in criminal activity during the preceding two-year period.

Program Structure and Partners

KCHA managed the selection, outreach and referral process to service providers. Households residing in Southwest King County were referred to the **YWCA**, and those living in East/North King County were referred to **Bellevue College**. Service providers established education and employment goals with participants and met at least monthly to support and monitor participant progress. Service providers offered case management services designed to increase employability, self-sufficiency, and empower participants to exit subsidized housing within five years. **The average quarterly caseload for each service provider was 20 participants.** For every month residents remained in good standing with KCHA and service providers, KCHA deposited \$200 into a personal savings account (managed by KCHA) that could be redeemed upon graduation. The maximum amount a participant could accrue was \$12,000.

Figure 1: ROP Clients by Enrollment Address*



*YWCA participants in Lake Forest Park and Bellevue may be the result of relocation during HOPE VI construction in White Center.

Figure 2: Resident Opportunity Plan Program Model



Participant Characteristics

The participant characteristics below were derived from KCHA administrative data and previous evaluations of the ROP initiative conducted by Clegg and Associates in 2014.* While the Clegg and Associates evaluation is based on a subset of the 94 participants, we do not feel the patterns for this subset differ substantially from that of the full population. Additional detail on participant characteristics is provided in the Appendix.

Program Outcomes



The ROP initiative engaged a total of 94 households of which **33% graduated** within five years, **40% were terminated**, and **27% were pending** as of program end. Reasons for ROP termination included voluntary withdrawal and non-compliance with program expectations. At the time of this report, only one terminated participant had also exited KCHA housing. All ROP participants pending at the program end in 2015 were eligible for their accrued ROP account if they exited subsidized housing within the five-year term. All families that were pending in ROP as of December 2015 were offered continued (though lighter-touch) support services through KCHA's Family Self-Sufficiency (FSS) Program; 16% of pending participants continued receiving case management services through FSS. Based on participants for whom there is a completed outcome (graduated and terminated), **the probability of successfully graduating from ROP was 45%**. This probability of success varied by service provider, with the YWCA graduating 53% of completed participants and Bellevue College graduating 37% of completed participants.

Program Duration



The median participant spent 2.2 years in ROP (based on graduated and terminated participants). Participants who successfully graduated from the program tended to stay in ROP longer, **with the median ROP graduate spending 3.3 years in the program**. Unsuccessful participants' median program duration was 1.4 years. Program duration varied by service provider, with median Bellevue College and YWCA graduates spending 4.4 and 2.9 years as ROP participants, respectively.

Household Characteristics



The **median ROP participant household size was 3**. Households served by the YWCA tended to have larger families (median size of 4), while households served by Bellevue College were smaller (median size of 2). **More than 80% of participants were female.*** Nearly **60% of participants were single parents with children under age 19.*** More than **90% of participants had completed high school or received a GED**; however, less than 20% held associates or bachelors degrees.* More than half of participants entered ROP at or below the federal poverty level, with **median annual incomes ranging between \$16,000 and \$17,000.***

Place of Birth / Race



Based on birthplace of the Head of Household, **nearly half of all ROP households were non-United States born**. Of households born outside the United States, Somalia (15) and Vietnam (8) were the most common birthplaces. Comparatively, **the YWCA managed a largely foreign-born caseload at 66%**, while graduating just over 45% of those households. Meanwhile, Bellevue College's foreign-born caseload of 30% experienced less successful outcomes, with only 23% graduating. The racial composition of ROP participants was as follows: **52% African American; 38% White; 6% Asian; 4% Pacific Islander.***

Subsidy Type



More than 70% of ROP households (67) received support through the Section 8 Voucher program, with the remaining 30% living in public housing. Of participants with a known program outcome (graduated or terminated), **participants living in public housing were more likely to graduate than their Section 8 peers (52% vs. 42% graduation rates)**. Both service providers engaged more Section 8 than public housing households; however, Bellevue College's caseload was comprised of a greater proportion of Section 8 households than the YWCA (80% vs. 64% respectively). This difference was likely driven by the YWCA's targeted outreach to Public Housing residents.

**Data pulled from the Clegg and Associates report indicated with an asterisk.*

ROP Savings Accounts

For each month a participant was in good standing with KCHA and their assigned service provider, KCHA deposited \$200 into a ROP savings account. If a participant graduated from the program and moved out of KCHA housing within five years, they were issued a check for the balance of their ROP account. **The median ROP account received was \$7,800.** If a participant was terminated from the program, their ROP account was returned to KCHA. A total of \$144,600 went unclaimed by terminated participants. As of this report, \$158,800 had been accrued by participants who were pending in the program. These accounts were frozen at the end of December 2015 and will be made available to participants that graduate and move out of subsidized housing within the five-year term.

Figure 3: ROP Account Values

Program Outcome	Total ROP Account Value	Median ROP Account Value
Graduated	\$230,000	\$7,800
Pending	\$158,800	\$7,200
Terminated	\$(144,600)	\$(2,200)

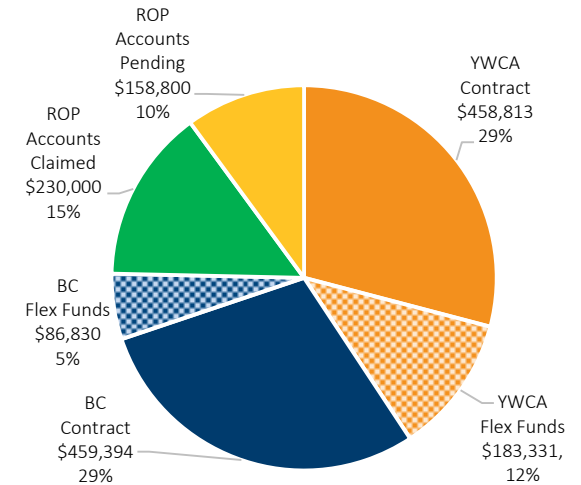
Program Costs

ROP program expenses took the form of i) social service contracts paid to service providers for case management services, ii) flexible funding paid to service providers for participants (e.g. transportation expenses, tuition, etc.), and iii) ROP account funds claimed by graduates. In total, **KCHA invested \$1,577,168 in the ROP initiative during the 6 ½ year period** from the 3rd quarter of 2009 to the 4th quarter of 2015 (\$242,641 per year). These funds were allocated as follows:

- YWCA: **41%** of total funds, comprised of 29% service provision and 12% flexible funds
- Bellevue College: **34%** of total funds, comprised of 29% service provision and 5% flexible funds
- ROP accounts: **35%** of total funds, comprised of 15% to graduated participants and 10% for pending participants

To determine how resources spent translated to program outcomes, costs were grouped by i) participants' years in the program, ii) the service provider with which they engaged, and iii) their program outcome. Looking only at participants for which program outcomes are known (graduated and terminated), approximately 67% and 33% of program expenses were invested in graduated and terminated participants, respectively. **The total cost per participant was \$15,974.** The total cost to successfully graduate a participant was **\$24,255** as compared to **\$9,436** invested for every terminated participant. This disparity was due largely to ROP accounts received by graduated participants. There was no major difference in costs by service provider. More detailed costs can be found in the Appendix.

Figure 4: ROP Program Costs | Total = \$1,557,168



Comparing ROP with the Family Self-Sufficiency Program

In prior reports, ROP has been compared to FSS as they are both workforce support programs designed to increase participants economic self-sufficiency. However, **there are differences in both program design and participant characteristics that make direct comparisons between ROP and FSS challenging**, most notably: 1) ROP graduates must exit subsidized housing at the end of their 5-year participation period, whereas FSS graduates are eligible to continue receiving housing subsidies; 2) ROP savings accounts accrue at a rate of \$200/month, whereas FSS savings account growth is structured around participant income gains; 3) The demographic characteristics of ROP and FSS participants are dissimilar; 4) FSS employs lighter-touch case management as compared to ROP (annual vs. monthly meetings); and 5) ROP contracts were structured to include access to flexible funding to support unique participant needs. Due to these key distinctions, among others outlined in Appendix C, **comparative interpretations between ROP and FSS outcomes should be made with caution.**

Lessons Learned and Recommendations

Lessons learned and recommendations were derived from analysis of KCHA administrative data, third party evaluations, and interviews with ROP program staff.

Addressing Self-Efficacy



Recommendation: Consider incorporating confidence building and empowerment as an intentional element of workforce development services.

In addition to planned service delivery activities, program administrators found case managers dedicated significant efforts to building participants' sense of self-efficacy, as it relates to their ability to build and achieve economic self-sufficiency. While taking intentional steps to remove public housing assistance – a resource upon which participants may have come to rely – participants should be supported socio-emotionally to build confidence that they can become self-sufficient and thrive after exiting subsidized housing.

Incorporating Financial Literacy Training



Recommendation: Continue to offer financial literacy as a curricular component of self-sufficiency programming.

Financial literacy and personal budgeting instruction was not originally a component of the ROP social service delivery; however, service agencies quickly realized this was a critical component to achieving success as participants' expenses to income ratios were a barrier to financial self-sufficiency. Both the YWCA and Bellevue College leveraged partnerships to offer participants services related to financial literacy, with special topics on debt, credit scores, and home buying.

Assistance in Navigating Complex Systems



Recommendation: Ensure that case managers have the knowledge and capacity to support participants in navigating complex service systems.

Participants' self-sufficiency goals varied to include such outcomes as degree and certification attainment, pursuit of small business ownership, and advancement in myriad career paths. The ROP pilot emphasized the importance of case managers being skilled in coaching participants to navigate the numerous and complex service systems related to these goals. In particular, ROP case managers had to have an in-depth understanding of area community college and other education institutions, workforce development services, local job markets and employers, and other related systems. Moreover, effective case management necessitated outreach and referral activities as well as more time intensive supports such as accompanying and advocating for participants as they navigated community supports and systems.

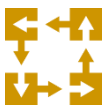
Decoupling Term Limits from Workforce Development



Recommendation: Consider adjusting the 5- year term limit, especially for those pursuing educational goals where economic returns may not manifest for several years.

Staff interviews indicated that both graduated and terminated participants advanced personal self-sufficiency goals. Some participants pursued employment goals immediately, while others chose educational pathways that would presumably translate into later career advancement. For participants pursuing education, the idea of completing an academic program and building assets within the 5-year term limit was daunting and in some cases, unrealistic. For participants with significant barriers, such as English language learners, immigrant families, and single parents, the term limit may also be prohibitive in achieving self-sufficiency. For these reasons, graduation rates from the program alone may provide a limited perspective on actual longer-term positive impacts of participation.

Intentionality in Program Design and Evaluation



Recommendation: Future pilot programs should identify program goals, program design, and evaluation objectives in concert.

Several program design and research questions were raised for which there was little supportive documentation. For example: What was the rationale for selecting two vastly different service providers and how did service delivery and outcomes vary across the two? As compared to FSS, was ROP a more or less effective use of KCHA resources? By considering program goals, design, and evaluation of pilot initiatives like ROP simultaneously, participant outreach, service delivery, data collection, as well as monitoring and improvement mechanisms could all be crafted with a data-informed approach in mind.

Appendix A: Participant Characteristic Tables

Figure 5: Participants by Program Status

<i>Service Provider</i>	<i>Graduated</i>	<i>Terminated</i>	<i>Pending</i>	<i>Total</i>
BC	13, 30%	22, 50%	9, 20%	44, 100%
YWCA	18, 36%	16, 32%	16, 32%	50, 100%
Total	31, 33%	38, 40%	25, 27%	94, 100%

Figure 6: Program Duration (years) by Program Status and Household Size (number of members) by Program Status

<i>Service Provider</i>	<i>Median Program Duration</i>			<i>Median HH Size</i>			
	<i>Graduated</i>	<i>Terminated</i>	<i>Total</i>	<i>Graduated</i>	<i>Terminated</i>	<i>Pending</i>	<i>Total</i>
BC	4.4	1.4	2.3	2	2.5	2	2
YWCA	2.9	1.3	2.2	4	3.5	4	4
Total	3.3	1.4	2.2	3.5	3	3	3

Figure 7: Participants by Birthplace by Program Status

<i>Service Provider</i>	<i>USA</i>				<i>Not USA</i>			
	<i>Graduated</i>	<i>Terminated</i>	<i>Pending</i>	<i>Total</i>	<i>Graduated</i>	<i>Terminated</i>	<i>Pending</i>	<i>Total</i>
BC	10, 32%	12, 39%	9, 29%	31, 100%	3, 23%	10, 77%	0, 0%	13, 100%
YWCA	3, 18%	3, 18%	11, 64%	17, 100%	15, 45%	13, 39%	5, 15%	33, 100%
Total	13, 27%	15, 31%	20, 42%	48, 100%	18, 39%	23, 50%	5, 11%	46, 100%

Figure 8: Participants by Subsidy Type

<i>Service Provider</i>	<i>Section 8 Voucher</i>				<i>Public Housing</i>			
	<i>Graduated</i>	<i>Terminated</i>	<i>Pending</i>	<i>Total</i>	<i>Graduated</i>	<i>Terminated</i>	<i>Pending</i>	<i>Total</i>
BC	10, 29%	18, 51%	7, 20%	35, 100%	3, 33%	4, 44%	2, 22%	9, 100%
YWCA	10, 31%	10, 31%	12, 38%	32, 100%	8, 45%	6, 33%	4, 22%	18, 100%
Total	20, 30%	28, 42%	19, 28%	67, 100%	11, 41%	10, 37%	6, 22%	27, 100%

Appendix B: Program Cost Table

Figure 9: Program Costs

		Costs with a Realized Return (Graduated)	Costs with an Unrealized Return (Terminated)	Total Costs with a Known Return (Graduated + Terminated)	Costs with a Yet Unknown Return (Pending)
BC	Social Service Contracts	\$214,951	\$213,100	\$428,052	\$118,172
	ROP Accounts	\$104,400	\$-	\$104,400	\$60,600
	Total Costs	\$319,351	\$213,100	\$532,452	\$178,772
	Participants	13	22	35	9
	Total Cost Per Participant	\$24,565	\$9,686	\$15,213	\$19,864
YWCA	Social Service Contracts	\$282,700	\$145,456	\$428,156	\$213,987
	ROP Accounts	\$125,600	\$-	\$125,600	\$98,200
	Total Costs	\$408,300	\$145,456	\$553,757	\$312,187
	Participants	17	16	33	17
	Total Cost Per Participant	\$24,018	\$9,091	\$16,781	\$18,364
Total	Social Service Contracts	\$497,652	\$358,557	\$856,208	\$332,160
	ROP Accounts	\$230,000	\$-	\$230,000	\$158,800
	Total Costs	\$727,652	\$358,557	\$1,086,208	\$490,960
	Participants	30	38	68	26
	Total Cost Per Participant	\$24,255	\$9,436	\$15,974	\$18,883

Notes and Definitions

- Cost Per Participant Per Year: Calculated by taking the total social service contract values (including support services and flexible assistance funds) and dividing by the sum of the participant years in program. Support services are assumed to be distributed equally across graduated, terminated, and pending participants.
 Bellevue College: \$4,596
 YWCA: \$5,098
 Total: \$4,854
- Social Service Contracts: Calculated by summing the product of cost per participant per year and participant years in program.
- Total Costs: Calculated by summing Social Service Contracts and ROP Accounts.
- Total Cost Per Participant: Calculated by dividing total costs by number of participants.
- Costs with a Realized Return: Costs associated with participants who successfully graduated from ROP and claimed their ROP account balances.
- Costs with an Unrealized Return: Costs associated with participants who were terminated from the program and were unable to claim their ROP account balances.
- Costs with a Known Return: The cumulative totals of costs associated with participants for whom KCHA knows their program outcome. Participants either graduated or were terminated.
- Costs with a Yet Unknown Return: Costs associated with participants who have not yet exited ROP. How these costs are allocated and whether participants receive their ROP account balances are yet to be determined.

Appendix C: ROP vs. FSS Program and Participant Characteristics

Figure 10: ROP vs. FSS Participant Characteristics

Participant Characteristics		ROP	FSS
Similar	Age	<ul style="list-style-type: none"> 70% in 30s or 40s 	<ul style="list-style-type: none"> 70% in 30s or 40s
	Gender	<ul style="list-style-type: none"> 84% Female 	<ul style="list-style-type: none"> 90% Female
	Household Size (median)	<ul style="list-style-type: none"> 3 	<ul style="list-style-type: none"> 3
	Tenure in KCHA Housing	<ul style="list-style-type: none"> 1-4 years: 28% 5-10 years: 44% 	<ul style="list-style-type: none"> 1-4 years: 26% 5-10 years: 43%
	Education Level	<ul style="list-style-type: none"> 90% high school diploma or GED 	<ul style="list-style-type: none"> 88% high school diploma or GED
Different	Race/Ethnicity	<ul style="list-style-type: none"> Fewer African American participants (~51%) More White participants (~36%) 	<ul style="list-style-type: none"> More African American participants (~64%) Fewer White participants (~29%)
	Place of Birth	<ul style="list-style-type: none"> More participants born outside the USA (~50%) 	<ul style="list-style-type: none"> Fewer participants born outside the USA (~17%)
	Primary Language	<ul style="list-style-type: none"> Fewer English-speaking participants (~64%) 	<ul style="list-style-type: none"> More English-speaking participants (~77%)
	Employment Status	<ul style="list-style-type: none"> Fewer unemployed participants at program entry (~18%) 	<ul style="list-style-type: none"> More unemployed participants at program entry (~50%)
	Income Level	<ul style="list-style-type: none"> Higher median household incomes at program entry (~\$16,500) 	<ul style="list-style-type: none"> Lower median household incomes at program entry (~\$13,800)

* ROP Place of Birth and Median Household Size derived from KCHA administrative data; all else sourced from the Clegg and Associates 2014 report.

Appendix C Continued: ROP vs. FSS Program and Participant Characteristics

Figure 11: ROP vs. FSS Program Characteristics

	Program Characteristics	ROP	FSS
Similar	Program Goal I	<ul style="list-style-type: none"> Economic independence 	<ul style="list-style-type: none"> Economic independence <i>(as defined by increased earned income and reduced welfare dependency)</i>
	Term of program	<ul style="list-style-type: none"> 5 years 	<ul style="list-style-type: none"> 5 years
	Proportion graduating <i>(of participants with a known outcome)</i>	<ul style="list-style-type: none"> 45% 	<ul style="list-style-type: none"> 51%*
	Average savings account value <i>(for graduated participants)</i>	<ul style="list-style-type: none"> \$7,267 	<ul style="list-style-type: none"> \$8,357*
Different	Service Delivery Funding Source <i>(excluding housing payments)</i>	<ul style="list-style-type: none"> 100% MTW single fund / block grant 	<ul style="list-style-type: none"> ~97% separate federal grant ~3% MTW single fund / block grant
	Program Goal II	<ul style="list-style-type: none"> Exits from subsidized housing 	<ul style="list-style-type: none"> Reduced rental subsidy dependency
	Cost per participant per year <i>(excluding savings account accruals)</i>	<ul style="list-style-type: none"> \$4,854 	<ul style="list-style-type: none"> \$1,464*
	Service Providers	<ul style="list-style-type: none"> Bellevue College YWCA 	<ul style="list-style-type: none"> YWCA KCHA Resident Services Coordinators
	Proportion of graduates exiting subsidized housing	<ul style="list-style-type: none"> 100% 	<ul style="list-style-type: none"> 31%*
	Proportion graduating and exiting subsidized housing <i>(for those who completed the program)</i>	<ul style="list-style-type: none"> 45% 	<ul style="list-style-type: none"> 16%*
	Frequency of case management	<ul style="list-style-type: none"> Monthly meetings 	<ul style="list-style-type: none"> Annual meetings
	Savings account accrual process	<ul style="list-style-type: none"> Flat rate of \$200/month 	<ul style="list-style-type: none"> A function of participant income gains
	What it means to 'graduate'	<ul style="list-style-type: none"> Achieve employment/education goals Exit subsidized housing 	<ul style="list-style-type: none"> Achieve employment/education goals <i>(Individual Training and Services Plan)</i> Not receive welfare for 12 months prior to graduation
	Housing assistance after graduation	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Subsidized housing still available

* Derived from KCHA administrative data of FSS participants between 2007 and 2015

** Source: Clegg and Associates 2014 report

Additional Resources on Workforce Development

There is a rich field of research that has been used to inform KCHA's programmatic direction and policy as it relates to self-sufficiency and workforce development initiatives. As KCHA is committed to incorporating best practices and developing innovative new approaches that meet local needs, below are four recent resources published by leading voices in the field of workforce development research.

Aceves, A., Greenberg D. H., Greenberg, D. M., Oppenheim, A., & Quiroz-Becerra, V. (2015). The Second Generation of Jobs-Plus Programs: implementation Lessons from San Antonio and the Bronx. MDRC. http://www.mdrc.org/sites/default/files/CEO-SIF_Jobs-Plus_2015_FR.pdf

Summary: This report provides analysis of the early experiences (2011 – 2014) of the Jobs-Plus scale-up and replication in San Antonio, TX and the Bronx, NY. Jobs-Plus has three program components: 1) employment services at on-site job centers in housing developments, 2) changes in rent rules to provide greater financial incentives to work, and 3) a community support network through which information about work-related opportunities can be shared.

De Silva, L., Kaul, B., Wijewardena, I., & Wood, M. (2011). Evaluation of the Family Self-Sufficiency Program: Prospective Study. Prepared for U.S. Department of Housing and Urban Development Office of Policy Development and Research. <https://www.huduser.gov/Publications/pdf/FamilySelfSufficiency.pdf>

Summary: This study examined FSS program characteristics across a sample of 100 housing agencies. The study also followed a group of 181 FSS participants from 14 programs to observe their FSS experience and outcomes.

Golden, O., Loprest, P., & Mills, G. (2012). Economic Security for Extremely Vulnerable Families: Themes and Options for Workforce Development and Asset Strategies. Urban Institute. <http://www.urban.org/sites/default/files/alfresco/publication-pdfs/412699-Economic-Security-for-Extremely-Vulnerable-Families-Themes-and-Options-for-Workforce-Development-and-Asset-Strategies.PDF>

Summary: The goal of this paper was to identify promising approaches that the Annie E. Casey Foundation's Center for Community and Economic Opportunity could take to help low-income families, particularly those with children whose parents face multiple risks factors. The activities this paper focuses on are workforce development (improving skills and employability) and asset development (increasing savings).

MDRC (2014). Jobs-Plus: An Evidence-Based Program for Public Housing Residents Expands. http://www.mdrc.org/sites/default/files/JP_An_Evidence-Based_Program.pdf

Summary: This two page summary gives an overview of the implementation of Jobs-Plus and the findings from the more than 5,000 individuals involved in the study between 1998 and 2003.

UNDERSTANDING THE HOUSEHOLDS, NEIGHBORHOODS, AND MOBILITY PATTERNS OF FEDERALLY SUBSIDIZED HOUSING RESIDENTS IN SEATTLE AND KING COUNTY

A report to the King County and Seattle Housing Authorities

12 September 2016



Introduction and Background

This research uses 2008-2014 administrative data from the Seattle (SHA) and King County Housing Authorities (KCHA) to improve our understanding of the residents living in the jurisdictions of these public housing authorities (PHAs). The objectives of this report are to describe the PHA populations and to examine the residential mobility¹ patterns and neighborhood opportunity of tenant-based voucher holders. This is the first time data from these PHAs have been combined and analyzed longitudinally; as such, this research provides a novel countywide perspective on the residential outcomes of voucher holders whose housing choice set may not observe the jurisdictional lines of administering PHAs.

This research is important for several reasons. Lacking knowledge of mobility patterns and neighborhood destinations among persons living in subsidized housing prevents an empirical assessment of whether voucher households do in fact move to places with more opportunity nearby. Research on residential migration primarily examines trends in the general population using popular datasets provided by the US Census and other institutions, but the lack of reliable data for subsidized households leaves gaps in scholars and policymakers' knowledge of the voucher-based housing search process. Consequently, research questions related to the types of neighborhoods these households reside in, household trajectories over time or the relative frequency of household moves prove difficult to answer precisely, and what work that does exist tends to focus on locational choices of subsidized households using narrowly defined study populations such as participants in the Moving To Opportunity (MTO) experiment. While this latter evidence provides an indication of the housing outcomes among families using locationally-restricted subsidies, administrative data sources have untapped potential for understanding more about mobility and spatial patterns across a broader population of all subsidized housing residents, in addition to across time and space. The goal of this project is therefore to develop a novel dataset that merges King County and Seattle Housing Authority data to examine the mobility patterns and neighborhood destinations of subsidized households.

Evidence on housing location and mobility patterns among subsidized housing residents provides new information to housing policymakers, scholars and practitioners, insights with patent importance given other research that shows how neighborhood quality and moving residences matter for educational attainment, income, health and other outcomes among the general population (see, for example, Williams and Collins 2001; Galster et al. 2007; Dong, Anda, and Felitti 2005). The 'place matters' perspective led to geographic mobility becoming a key goal of US housing policy and the notion that housing assistance should not only provide the means toward a place to live, but also provide options to live in low-poverty, high-opportunity areas. Discussion of mobility and geographic choice is particularly timely given recent research and the passage of fair housing rules by HUD and the Supreme Court. New evidence from Chetty, Hendren, and Katz (2015) shows that low-poverty neighborhoods are not just associated with positive outcomes, but also significantly impact later economic and educational success among children. Additionally, HUD's final rule on Affirmatively Furthering Fair Housing and the Supreme Court ruling on disparate impact provide new momentum to policy discussions on neighborhood choice, segregation, and mobility patterns.

¹ For the purposes of this report, "residential mobility" and "residential moves" are synonyms. These are shortened to "mobility" and "moves," respectively.

King County is an ideal study area for exploring subsidized housing residents' mobility and place characteristics given its large geography, the numerous and diverse rental markets represented therein, and growing conversations about area housing affordability. However, to date, PHAs have not used their data to fully understand the prevalence and location of moves among tenant-based voucher holders, move predictors in this population, and whether those who move relocate to or from "opportunity" neighborhoods. Research is needed that capitalizes on the potential of PHA administrative data to confirm or refute prevailing assumptions on residents' mobility and neighborhood outcomes as well as to discover new patterns in this area. This information is critical toward the crafting and implementation of data-driven policies and programs that align with empirical data indicating residents' patterns, preferences, and needs.

The following report first describes PHA residents in Seattle and King County, their demographic and household compositions, and their mobility prevalence and then answers two focal questions: 1) *Does the frequency of moving differ according to household and resident characteristics?* 2) *For those who move, does the opportunity ranking of destination neighborhoods vary by household and resident characteristics?*

Data

To complete this report, researchers compiled and analyzed a dataset with information files on PHA residents within KCHA's and SHA's jurisdictions² from 2008 to 2014,³ along with neighborhood data from the Puget Sound Regional Council (PSRC) and the US Census Bureau, from 2012 and 2010, respectively.⁴

PHA data overview

The PHA administrative data were taken from the reporting fields on Form HUD-50058. This information is collected by the PHAs at least once per year from all non-elderly families and at least once every three years for elderly households.⁵ Additionally, this information is updated any time that there is a change in a household's income, residence, or the composition of individuals living in the unit. The data include demographic characteristics, household income, rent, and other financial information, geographic information (addresses), and administrative details (for example, whether a household lives in SHA's or KCHA's jurisdiction, and the action type—whether the 50058 form was filled out as part of a new admission, yearly update, etc.).⁶ Researchers generated information about the frequency and other qualities of households' residential moves using addresses.

All results describe households, using information about either the heads of household (if the information is about individuals—for example, race, gender, and age) or about the household itself (if the variable pertains

² Whether a household is counted as being in SHA's or KCHA's jurisdiction is based on whether the household physically lives in that PHA's jurisdiction. This information is derived from the household's current street address.

³ SHA data from 2005 are additionally descriptively analyzed, and the results from this can be found in the SHA-specific tables for statistics over time in Appendix A.

⁴ For more information on how the data set was compiled and cleaned, please see the technical report in Appendix C.

⁵ Information from 50058 forms is typically entered into an electronic database within one month from the completion of the form. However, in some cases, this information takes up to three months to be entered.

⁶ See Appendix C for a table that describes the variables used in the analyses.

to the entire household—for example, whether a household includes at least one child, people per room in the unit, and year the housing unit was built).

Merging the PHA data

Data from each PHA came in multiple files, which researchers combined using unique identifiers for everyone in the household. When consistent unique identifiers were not available, the researchers created them using a process called “fuzzy matching,” which matches individuals on name and birthday, but does not always require exact matches and therefore allows us to match those for whom the reported names and birthdays include data entry error. Once the information was merged, researchers removed all individuals other than the heads of household from the data analysis file so that the data could be analyzed for each household served rather than all individuals.

Neighborhood data

Data on the neighborhoods in which PHA residents live are from the PSRC’s Kirwan Opportunity Index, as well as the US Census Bureau. For the Kirwan Opportunity Index, PSRC calculated an index of neighborhood quality based on measures of access to education, economic, health, transportation, and housing opportunities. This index was then broken into three categories (low, moderate, and high opportunity). Researchers also assessed data from the US Census Bureau to supplement the Kirwan Index and include measures of racial composition, which were not incorporated into the Index. To merge the neighborhood data with the PHA data, researchers generated neighborhood (tract) identifiers (in the PHA data file) using residents’ addresses at a given point in time. Researchers then used this information to combine the PHA, PSRC, and Census data files.

Methods

Descriptions of households

To describe PHA households, researchers calculated either population averages (the arithmetic mean), like in the example of household income or the age of household heads, or the percentage of the population that falls into a certain category—for example, the percentage of households that are headed by African Americans or which include one or more children. Households are described at several time points: 2008, 2011, and 2014; for the sake of parsimony, the descriptive statistics in this report are largely presented from a cross-section of households from 2011 except where otherwise noted.⁷ Estimates from 2008 and 2014 are available in the appendices. All analyses are completed for the combined data set of tenant-based voucher holders, as well as for those living in KCHA’s and SHA’s jurisdictions separately (yielding three sets of results).⁸ We present

⁷ Overall households are generally described as of a specific year rather than from averages across all years, because averages could not be calculated for many variables across time. For example, researchers could not average whether a household lived in a low, moderate, or high opportunity neighborhood over time, because “low,” “moderate,” and “high” are not numbers from which calculations can be completed. Instead, it is necessary to identify the quality of the neighborhoods in which residents live *at a particular time*. For this, researchers elected the mid-point for the combined data set (2011).

⁸ Regression analyses for both PHAs include two versions of models with neighborhood characteristics: one includes the regional Kirwan index calculation; the other includes the King County-specific calculation. Further, additional regression analyses specific to KCHA use only the regional Kirwan index, while analyses specific to SHA include only the King County-specific calculation of the Kirwan index.

counts and relative sizes of the tenant-based voucher sample (compared to all HHs served by the PHAs) at the beginning of the results section, and then move into describing the sample and answering the focal research questions through statistical models. Results broken down by agency are included in the report when notable differences were found, with all agency-specific statistics and models otherwise found in the report appendices. Descriptive statistics for other program types are also available in these appended sections.

Addressing research questions

To answer the three research questions, researchers used advanced statistical techniques, which they described in more detail in Appendix C. It is important to note here that while researchers generally *described* households using information from a given year, they used information from households for each *month* to address research questions. This approach allowed the researchers to consider how conditions within and around households varied over time, with more precision than an annual snapshot would provide (for example, this approach considered the possibility of household incomes changing dramatically from one month to the next). Both types of regression models model how the included predictors impact the probability of a given outcome occurring, so the discussion of these models emphasizes any important variables substantive effect, e.g. increasing likelihood of moving in each month, in lieu of describing coefficient estimates. Detailed tables are available in the corresponding appendix for the models.

Missing data and sample sizes

Most households are missing information for at least one variable at a given point in time or over time: 21,655 out of the '08-'14 total of 50,792 households (about 42%) had complete information across all variables used in the models of mobility and opportunity scores at destination.⁹ To describe households, missing data are not dealt with to obtain a consistent sample size across tables because this would eliminate a large portion of population from the analyses. In this case, averages/percentages were calculated using the information available, ignoring cases of missing data. For analyses aimed at addressing the focal three research questions, the methods required that cases with missing values be removed from the analyses. Because of this, a relatively small portion of households are included in these analyses.

Results

Researchers first sought to describe PHA residents to gain insights into what the average household looks like and to partially answer questions about their residential mobility and neighborhood attainment. To draw the overall picture, we begin by describing the sample from a variety of perspectives. The bulk of the discussion describes households and heads of households.

Household Counts, by Program Type and Agency for 2008-2014

⁹ Often, missing information indicates that the data were never collected or were entered into the database erroneously. On rare occasions, researchers eliminated information that was present in the data, because that information was nonsensical (for example, monthly rents with nine digits).

KCHA and SHA together served 50,792 unique households across all program types between 2008 and 2014. About 11% of these households had at least 1 month recorded in both jurisdictions during the 7-year period the data cover (5,434 households), which provides some insight into the prevalence of ports across Seattle's boundaries among PHA program participants. Of the remaining majority of households, 20,449 (40%) only ever lived in KCHA, while 24,909 (49%) only ever had residence within SHA.

A little over half (56%) of the overall sample of *all* PHA participants reported using a tenant-based voucher at some point between 2008 and 2014, about 21% used project-based vouchers at some point, and 32% lived in public housing at some point (otherwise referred to as “hard units”)¹⁰. Less than 10% of the sample reported participation in two or more of the housing programs, so the program groups are mostly exclusive despite having some overlap. Nearly all households who lived in *both* jurisdictions at some point between 2008 and 2014 had a tenant-based voucher for their program type (92%, 5019 of 5434 households). About 37% of approximately 25k households only ever living in SHA reported were tenant-based voucher users at some point (9,162), while roughly 70% of the approximately 20k households only ever living in KCHA were tenant-based voucher users during the period of 2008-2014 (14,272).

Rationale for Restricting Focus to Tenant Based Voucher Holders

The remainder of the results focus only on the sub-sample of tenant-based voucher residents to speak precisely about patterns of mobility and the specific households engaged in this mobility process (i.e. the residential mobility process among participants in public housing and other programs may qualitatively differ from that of tenant-based voucher holders). To provide comparison between agencies in terms of their active jurisdictions, we use address-based identifiers to define which PHA a household belonged to in each month. Regarding the households existing in both PHAs records, we do not treat these shared households as a separate sample due to their relative paucity, but instead include these cases in the sample respective to the address as of the last valid record in the year (for the descriptive statistics) or as of the current person-month (for the models). The samples include households with multiple program types recorded only during months where an active tenant-based voucher was noted. Given that the PHAs serve residents from many backgrounds and with distinct sets of housing and community needs, we consider the overall picture of PHA residents from a variety of perspectives. These include key household types, householder race/ethnicity, and householder U.S. citizenship. Throughout subsequent text, in which we discuss other household and neighborhood characteristics, we identify ways that the above characteristics differ by socio-demographic background.

Key Sub-Populations and Socio-demographic Characteristics

Figure 1 describes the relative sizes (i.e. percentages) of key household types among the overall and agency-specific tenant-based voucher households, using a cross-section of the data from 2011. We defined the elderly, disabled and workable sub-populations depending on whether at least one household member had the corresponding status. The family composition sub-populations are exclusive of each other, allowing comparison between the two-parent and single-parent households where appropriate.

¹⁰ These figures were 28,453, 10,446 and 16375 for TBV, PBV and PH respectively.

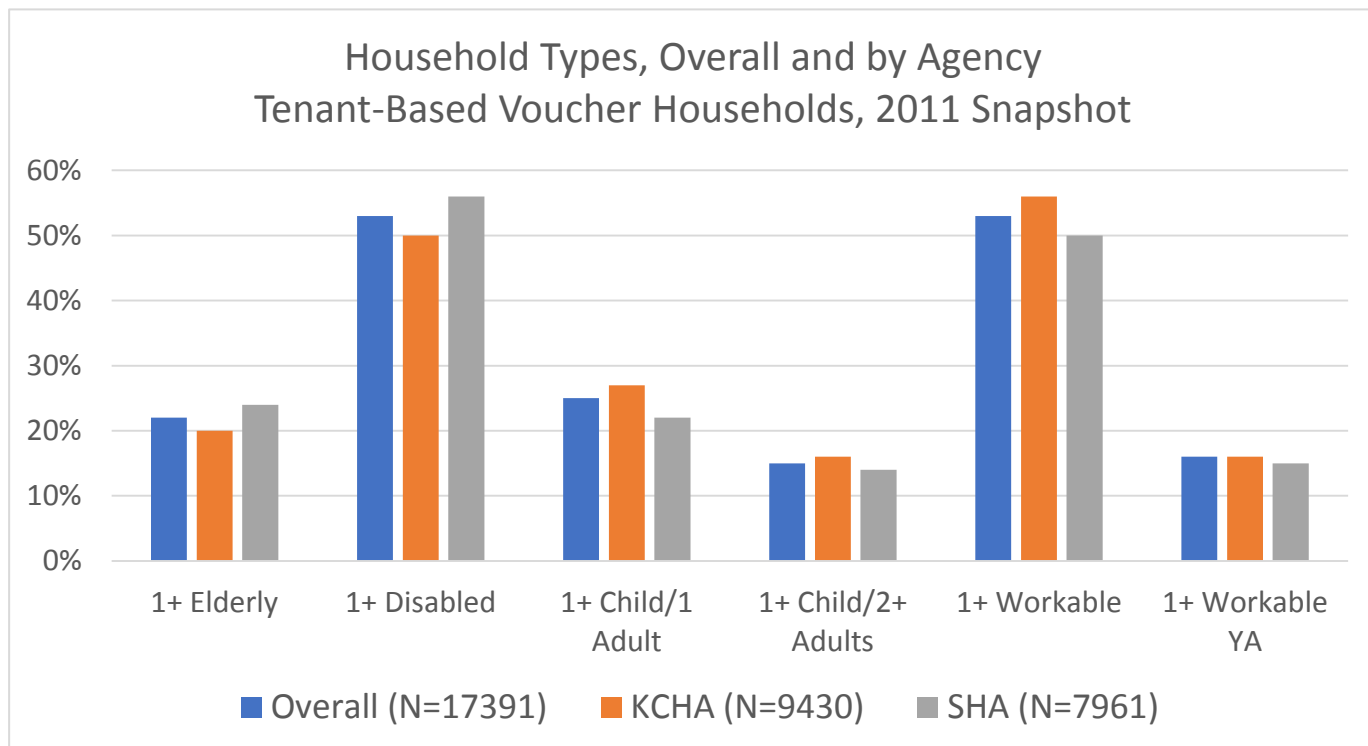


Figure 1 – Key Household Types within the Overall, KCHA and SHA samples of tenant-based voucher households in 2011.

NB: The household types were not defined to be mutually exclusive of each other, so a given household can belong to multiple categories if applicable, though the categories for children/adult composition do not overlap.

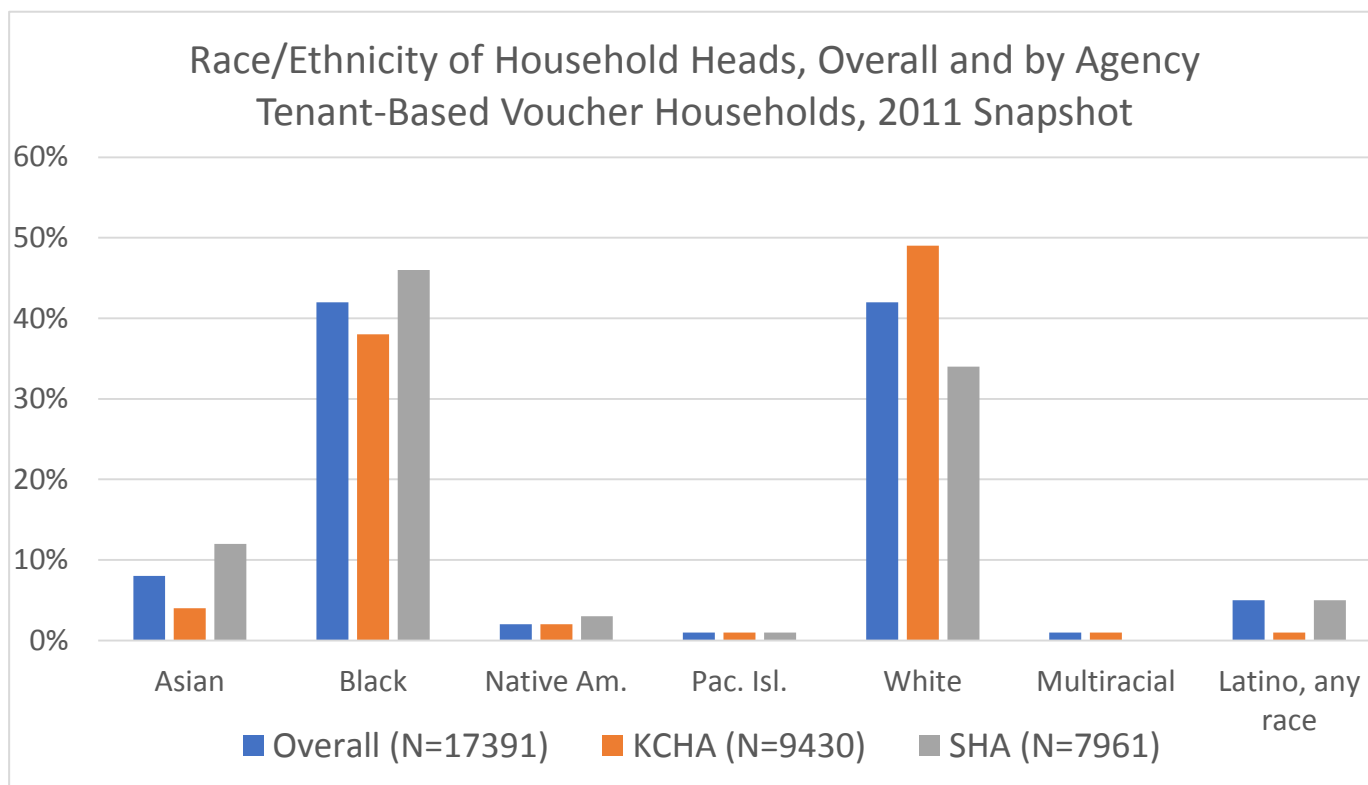


Figure 2 – Racial and Ethnic Composition of Heads of Households within the Overall, KCHA and SHA samples of tenant-based voucher households in 2011.

Note the total number of households in the overall and agency-specific samples given for reference in Figure 1's legend. In terms of the distribution of household types, disabled and work-able households constitute the largest sub-populations of households regardless of which sample is considered. Additionally, roughly 20% of all households have at least one elderly member. When considering household compositions, 40% of all cases include at least one child present in their household per the cross-section described in this figure, with most of this subset of households led by a single-parent. Tabulating the overall sample of households in 2011 finds that about 95% of the single-parent household cases were female-headed as well, both in overall and in agency-specific analyses. Non-Hispanic black-headed households are slightly overrepresented among households with children and one parent, while Non-Hispanic white-headed households are disproportionately represented among the elderly household type.

Head of Household Race and Ethnicity

Figure 2 provides the relative distribution of racial and ethnic groups within the overall and agency-specific samples of Households¹¹. In the overall data, non-Hispanic black and non-Hispanic white Heads of Household make up about the same portion of the sample (42% each). Within each agency, we find modest differences in the share of these two groups, with slightly greater representation of non-Hispanic black householders in SHA and a slightly greater portion of non-Hispanic white ones in KCHA. At 12%, non-Hispanic Asian-headed households are about three times more common in SHA than KCHA (4%). Similarly, most of the Latino-headed households in the overall sample have residences within SHA's jurisdiction. Small shares of Native American-, Pacific Islander- and Multiracial-headed households make up the remaining composition of each sample. Non-Hispanic white Heads of Household are more common among elderly and disabled households, while non-Hispanic black Heads of Household are more prevalent among households with children and work-able households. Latino household heads are somewhat overrepresented in single-adult households with children (35% of Latino-headed HHs are single-parent HHs too, compared to 27% of non-Latino HHs).

Age, Gender and Citizenship among Heads of Household

The average PHA tenant-based voucher Head of Household is 48 years old using the overall sample; using the agency-specific data, these averages are 47 and 50 years old for KCHA and SHA respectively. At one extreme, elderly households have an average householder age of 70; at the other, the average age of single-parent Heads of Household is 36. About 70% of the overall sample of households are female-headed, with a relatively larger share of these households in KCHA (74% in contrast to 65% in SHA) when analyzing agencies separately. Across the three samples about 85% of households have an eligible US citizen as their Head of Household.

Household Size and Members-to-Rooms Ratios

The average number of household members is 3 across each sample, with the average ratio of members-to-rooms in the housing unit measured at about .80. On these two measures, we find only minor difference by agency and most sub-groups. A few, however, are worth noting: elderly households are smaller on average

¹¹ Though focusing on Head of Household race does not provide insight into differences that mixed-race households may compared to single-race households, this decision is motivated by the fact that Heads of Household have the most complete data and an assumption that the household head would be the key member in the housing search and application process.

(2.6 members), whereas single-parent households are a similar magnitude of difference greater typically (3.6 members). For reference, two-parent households have an average of 3.3 members. For other household types and most other socio-demographic groups, the data show only minor difference in household size and housing unit density in terms of members per room.

Household Income

Most households have a source of income (66%) when looking at both jurisdictions together, though the data show considerable difference when broken down by agency—50% of KCHA households have income from any source compared to 85% of SHA Households. In terms of gross individual and household income, tenant-based voucher Heads of Household average \$8,005 and \$9,674, respectively, when looking at both PHAs together. Specific to KCHA, these figures were \$5,676 and \$6,994; for SHA, estimated averages were \$10,778 and \$12,849. Speaking in terms of the overall sample of tenant-based voucher households, 20% have wage income, 51% have benefits income and a little under 10% have income through some other source. In contrast, the estimates for KCHA are 15%, 38% and 8% respectively for wage, benefits and other income sources; for SHA, the estimates are 25%, 66% and 11%. Altogether, these statistics suggest that SHA households have relatively more income and a greater likelihood of have wage and benefits income compared to a comparison group of KCHA comparison households. Disabled households averaged a lower income than non-Disabled households, while households with children and any number of parents averaged relatively higher incomes than households without children. Non-Hispanic black and Asian households had substantially greater average incomes, while non-Hispanic whites tended to earn less.

Housing Rents

With respect to housing costs, the average gross rent for tenant-based voucher holders was about \$994 using the overall sample cross-section from 2011. In terms of tenant rent (i.e. gross rent minus voucher subsidy and utility allowance), most households had a small debt to their respective PHA (\$26), though the standard deviation for this item (\$103) suggests substantial share of residents fall between receiving a small credit and owing up to just over \$100. Parsing this information out by agency finds that KCHA residents have slightly lower higher gross rents (\$1,019) on average, but similar tenant rents (\$34) after deducting relevant subsidies and allowances. Within SHA, the average householder has a gross rent of \$964 and a tenant rent of \$23. Elderly and disabled households tended to have lower gross rents in the overall data (\$873), whereas single-parent households averaged a considerably higher amount (\$1211). Since female-headed households comprise most of the single-parent households in the data, a gender difference between male- and female-headed households in average rent follows accordingly (female mean \$1059, male mean \$844).

Housing Cost Burden

The data for this measure show some irregularity, so we describe it generally here but omit it from the statistical models of mobility. The average housing cost burden for all households was .56, and specific to KCHA and SHA these estimates were .57 and .56 respectively. For reference, these three figures were .39, .40 and .38 as of 2008, so there was a modest increase following the recession. However, after 2011 the trend levels off toward consistency (.54, .53, .54 respectively in 2014).

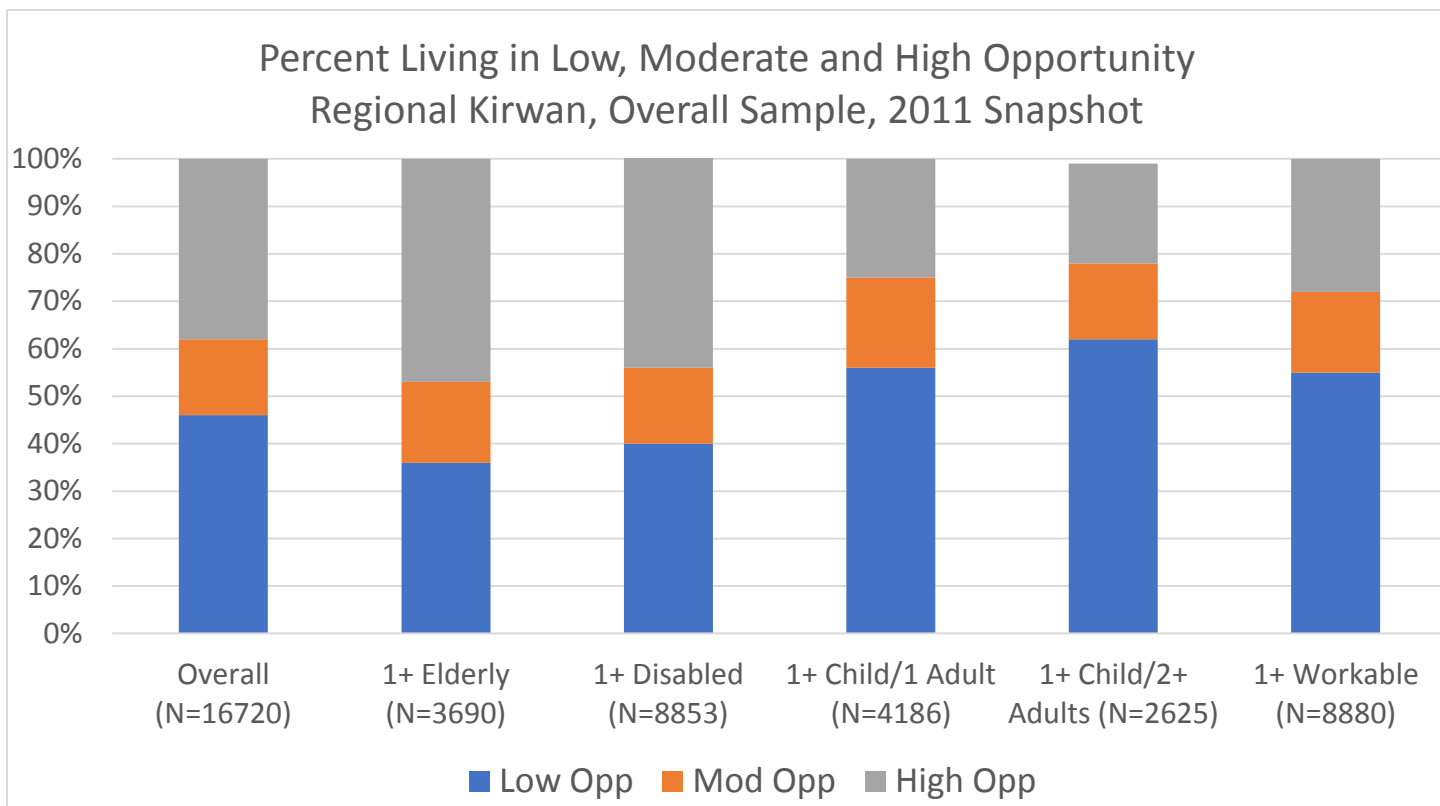


Figure 3a – Distribution of Key Household Types in Low, Moderate and High Opportunity Neighborhoods using the overall sample of tenant-based voucher holders and PSRC's regional Kirwan Index.

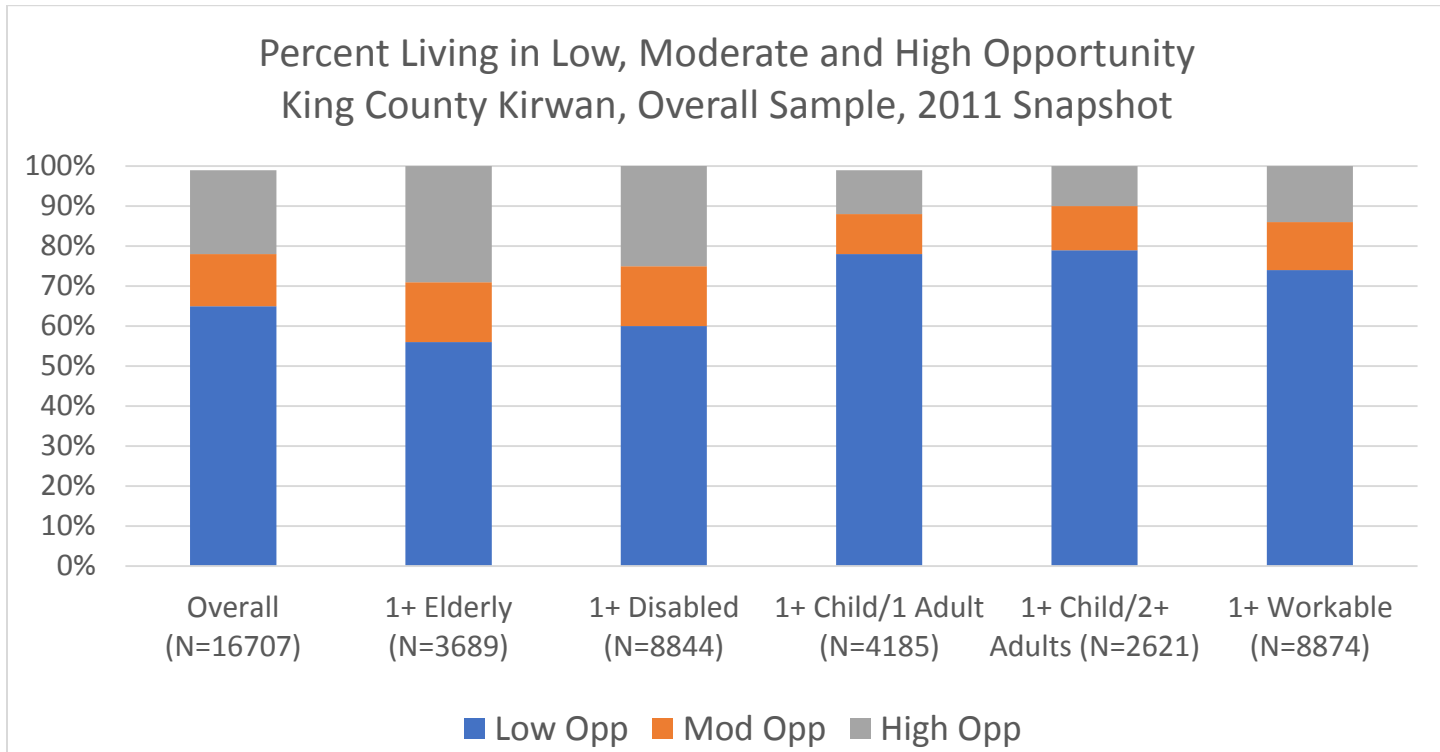


Figure 1b – Distribution of Key Household Types in Low, Moderate and High Opportunity Neighborhoods using the overall sample of tenant-based voucher holders and SHA's King County-specific Kirwan Index.

Figures 3a and 3b show the distribution of households between levels of neighborhood opportunity. Using the regional measure, low opportunity neighborhoods hold a plurality among work-able households and those with children. About 40% of all households live in high opportunity with the regional measure, with the alternative index this figure is roughly halved. With the King County calculation, most households live in low opportunity neighborhoods (65%), especially those with children present. Upwards of 75% of dual- and single-parent households live in these places, compared to the overall average of 65%. Elderly and disabled households fare slightly better, with fewer than average residents in low opportunity among these household types. Consequently, households living in high opportunity neighborhoods are more likely to be elderly or disabled in terms of key household types, and this observation remains true when analyzing neighborhood quality with the other Kirwan measure.

Figure 4 shows a similar set of estimates for percent living in each Kirwan index score, except that the data are parsed out by race and ethnicity this time. For non-Hispanic whites and non-Hispanic blacks, the two groups with the largest shares of the sample, a clear difference emerges. Based off the percentages indicated in this figure, the average white household has a 50-50 chance of living in high-opportunity versus somewhere else, whereas the average black household would be expected to live in low opportunity on average.

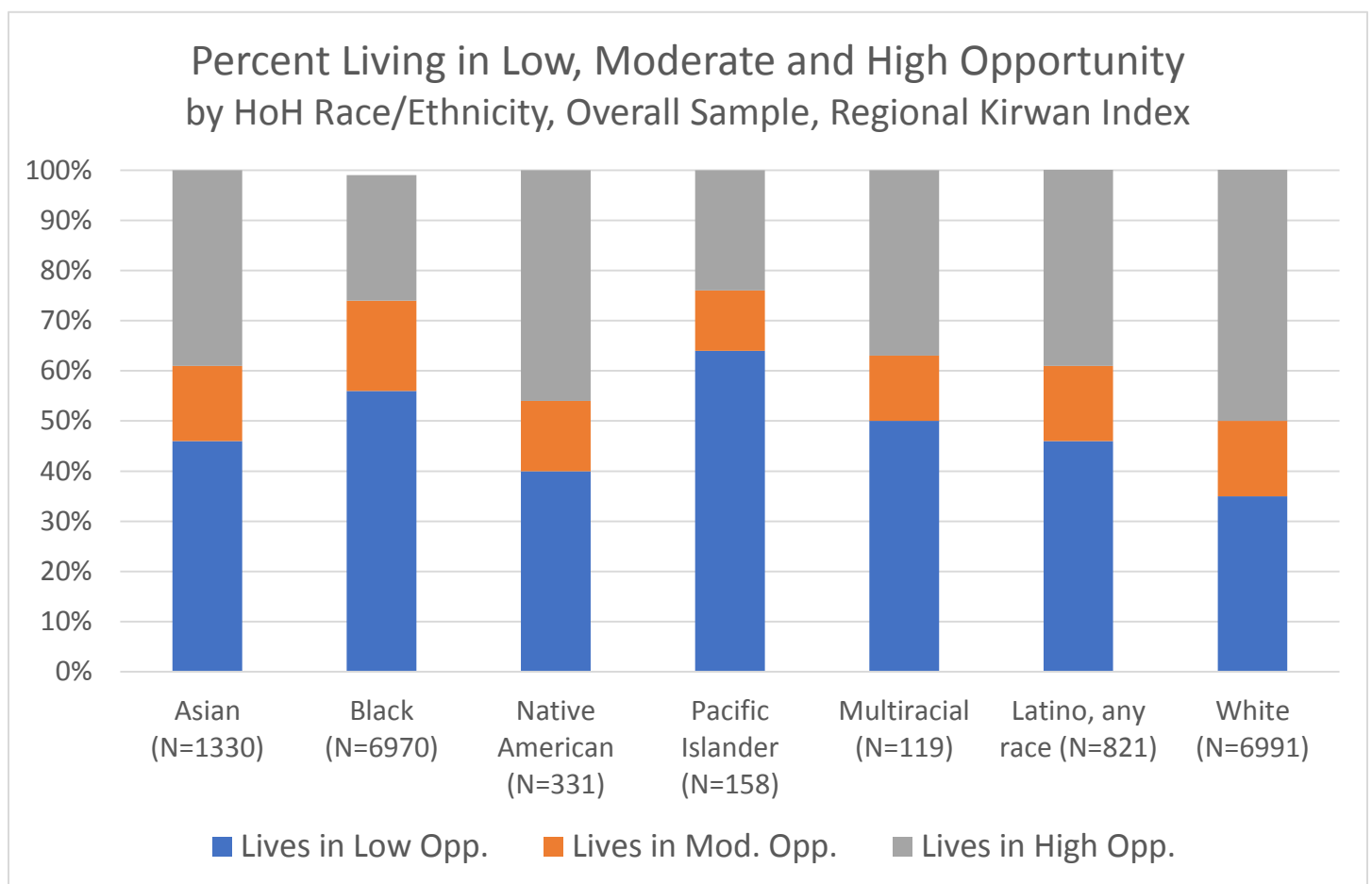


Figure 4 – Distribution of Households in Low, Moderate and High Opportunity Neighborhoods across race and ethnicity using the overall sample of tenant-based voucher holders and PSRC's regional Kirwan Index. Racial and ethnic group sample sizes listed with each category in parentheses.

Asian, Native American, multiracial and Latino households all tend to fall somewhere in between non-Hispanic whites and blacks with respect to neighborhood opportunity levels. Pacific Islanders have a distribution across neighborhood types comparable to non-Hispanic blacks, though their size in the overall data is relatively small.

Though the Kirwan index is a robust measure of neighborhoods' relative proximity to employment, education and other resources, the racial composition of these neighborhoods is one dimension which the index does not consider. **Figure 5** shows the racial and ethnic composition for the average tenant-based household (the overall column), and then parses these statistics out by the Head of Household's race and ethnicity for the 4 largest racial and ethnic groups within the data¹². The average household lives in a neighborhood that is about 50% non-Hispanic white and 50% people of color, though the picture changes somewhat when considering how compositions might differ based on the householder's race—non-Hispanic blacks and Asians live in majority-minority neighborhoods on average, whereas non-Hispanic whites and Latinos live in majority-white neighborhoods usually.

RQ1: Does the frequency of moving differ according to household and resident characteristics?

Moving into a discussion of the focal research questions, some baseline figures about residential mobility and its relative frequency are appropriate. Within the first year of the data (2008), about 14% of the sample had

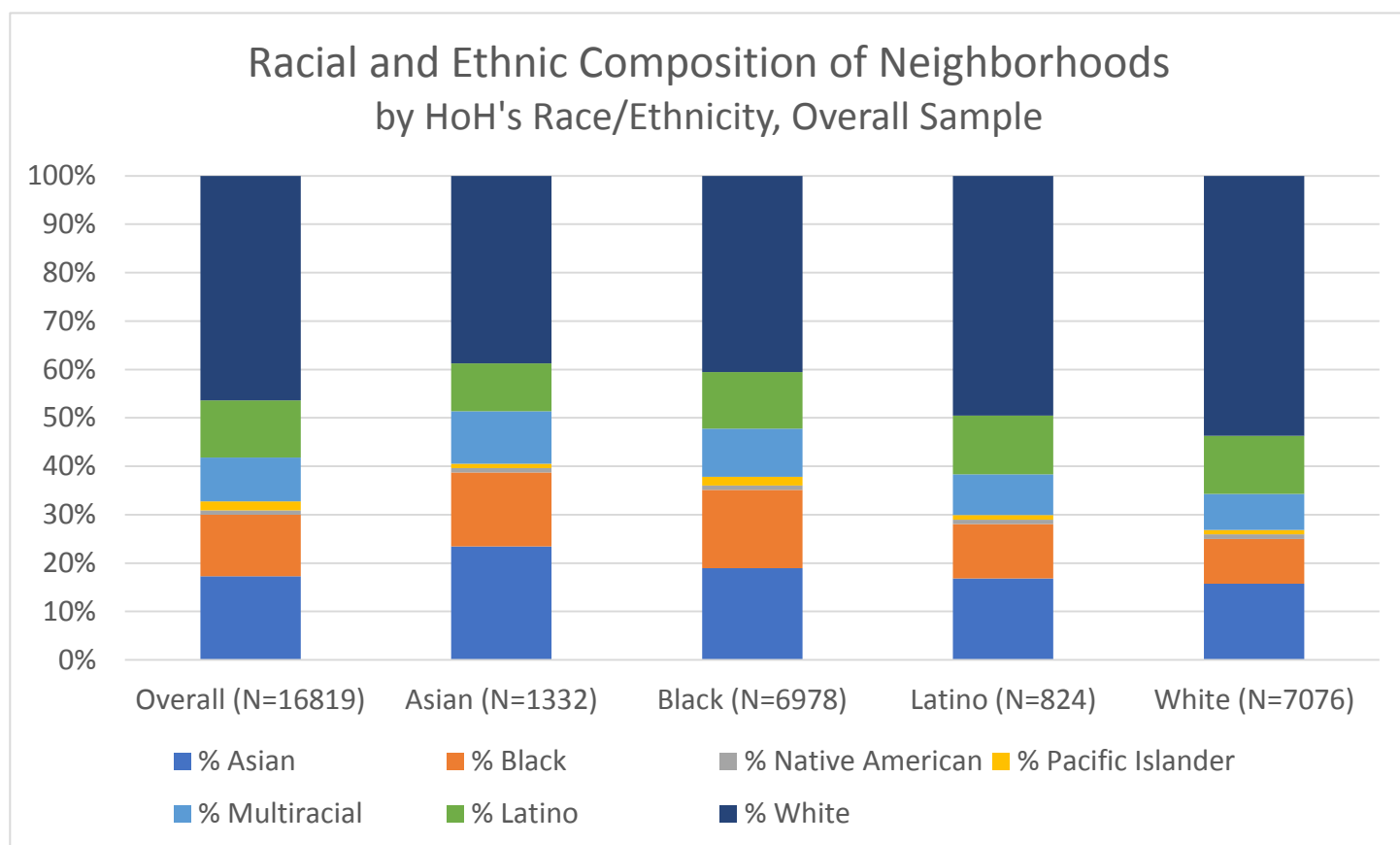


Figure 2 – Racial composition of households in the overall sample of tenant-based voucher households, on average and broken out by Head of Household's race/ethnicity

¹² The data for racial composition are from the Census Bureau's 2010 Census of Population

recorded at least one move. Less than 1% of the sample moved multiple times in this first year the data encompass. As of 2011, about 60% of the approximately 17,000 households served by the PHAs at that time had never moved, 27% had moved once and about 14% of the sample had moved 2 or more already. By 2014, the data show that about 53% of the overall sample of about 18,000 households in the sample during that year had never moved, 25% had moved once, and about 20% had moved multiple times.

Estimating the correlations between household mobility in a month and relevant background variables shows many relationships to investigate further with the statistical models. For example, being a work-able or single-parent household associates with greater mobility, as does living in a low opportunity neighborhood. Since we find that prior mobility, sub-population status, Head of Household demographics and socioeconomic status and neighborhood opportunity scores all associate with differences in probability of mobility in each month, in the following models we focus on how predictors' relationships with mobility changes or remains robust when analyzed from a multivariate approach. Householder background and neighborhood characteristics also received further investigation in the statistical models where we could test if relationships persist holding

Predicted Probability of Moving in a Given Month (Model 2)

PHA HH-Months 2008-2014

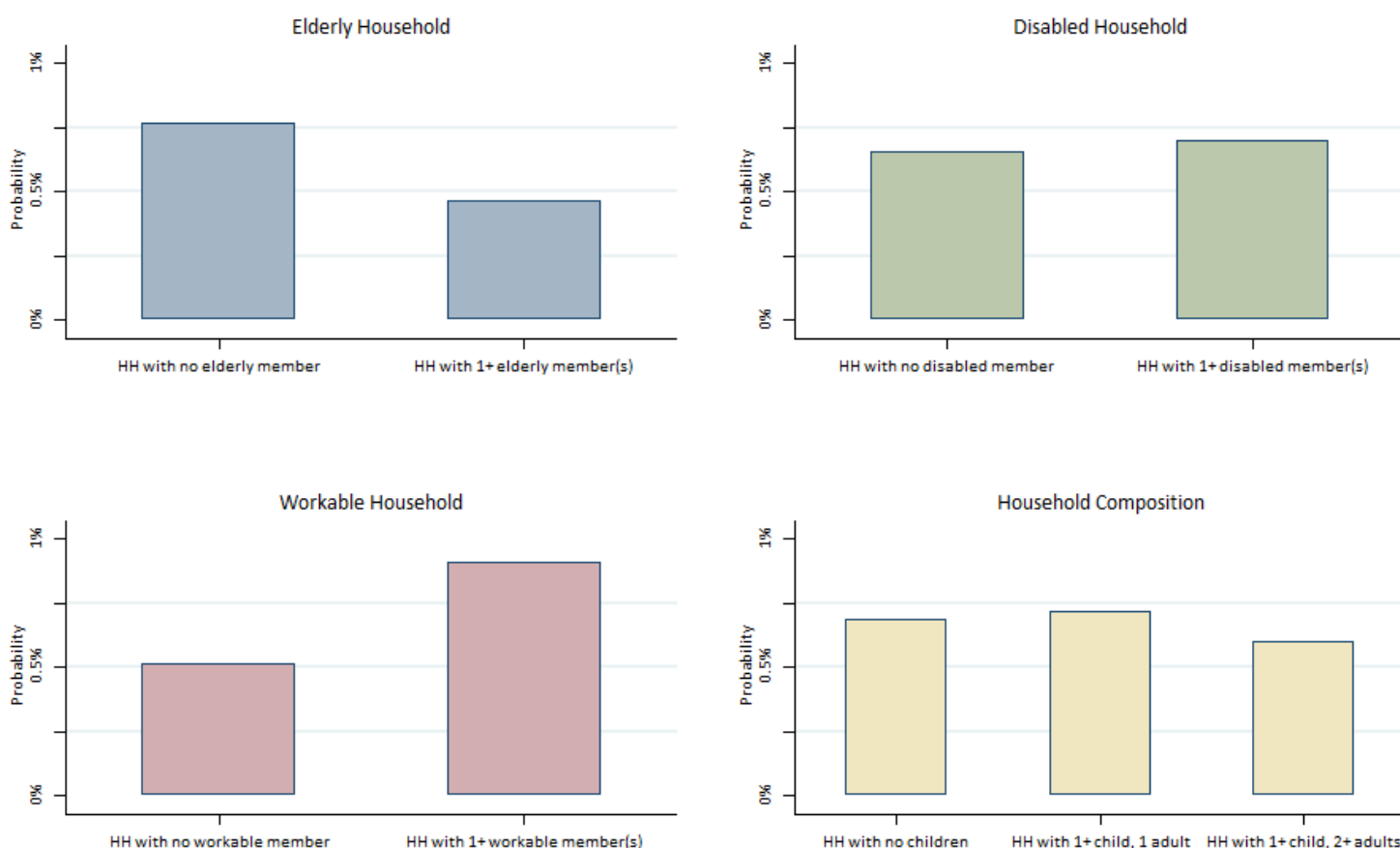


Figure 3 – Predicted probabilities from the overall sample Logistic Regression of whether a household moves in a month. Each sub-plot of this figure shows the difference of belonging to one of the sub-populations holding other variables at their means.

other potentially confounding characteristics constant (e.g. are single-parent households more likely to move, all other factors like work-able household status held equal).

Figure 6 shows the probability of moving in a month for the key sub-populations, setting all other variables at their means (in this model specification the included variables are: the other HH types, current length of tenure in the PHAs and number of prior moves). While the estimated probabilities of moving are generally small (.5% to 1%), it can be helpful to think about the cumulative sum of these probabilities over the course of a calendar year. For example, households with 1+ work-able member have about a little under 1% probability of moving in a month, or alternatively, about 10% over the course of a year. This figure is nearly double the probability of households without work-able members. Somewhat unsurprisingly, elderly households have a lower likelihood of moving on average. Though single-parent households have about the likelihood of moving in a month, two-parent households show a modest but significant difference in their probability of relocating. Since these categories are not exclusive of each other, the models suggests single-parent workable households face the highest propensity of mobility in a given month.

The probabilities in **Figure 6** describe differences between sub-populations without considering the head of household's demographic background, factors which bivariate correlations do show to associate with differences in mobility. **Figure 7** depicts the differences in the likelihood of moving based on the householder's race/ethnicity and gender. Black and multiracial female-headed households have the highest probabilities of moving each month among any of the depicted groups by these estimates, whereas Native-American, Pacific Islander and non-Hispanic white males are the least likely to move with about half as large a probability as the former two types of households. The model used to predict these probabilities of moving controlled for sub-population status, Head of Household demographic characteristics, Head of Household's gross individual income, tenant rent, and housing stock characteristics of the unit the household resided in pre-move.

After introducing one last control variable measuring the opportunity score at origin (i.e. whether the household started in low, moderate or high opportunity before moving), we find the following relationships robust to all included controls¹³: Disabled and work-able households are more likely to move on average, while controlling for Head of Household age explains away the difference that elderly households had initially. Further, after parsing out householder and housing stock characteristics we find that each additional move exerts a slight negative effect on the likelihood of future mobility and length of tenure in a PHA no longer matters for differences in mobility. One hypothesis for the observed pattern of significance across models would be that racial, gender and age differences in the likelihood of mobility suppress the general tendency for households to increasingly stay put after each additional move, though this hypothesis was not explicitly tested in the models. Higher levels of gross income related to a slight increase in the likelihood of moving, whereas higher levels of tenant rent (i.e. debt to the PHA) discouraged mobility. Since a substantial share of individuals live in low opportunity no matter which index is used, the role of income to spur mobility seems

¹³ The significance and direction of these effects hold constant when using either the regional or King County Kirwan index in the model. Using the King County measure shows a greater reduction in the likelihood of moving for those already in high opportunity, but otherwise describes a similar pattern of mobility as the regional measure. (cf: Model 4 in Tables 1 and 2 of Appendix B)

consistent with the notion that households with the means (and potentially lower levels of monthly debt to the PHA) are more likely to try to move to a better area.

Predicted Probability of Moving in a Given Month, By Race and Gender

PHA HH Months 2008-2014, King County Kirwan Index

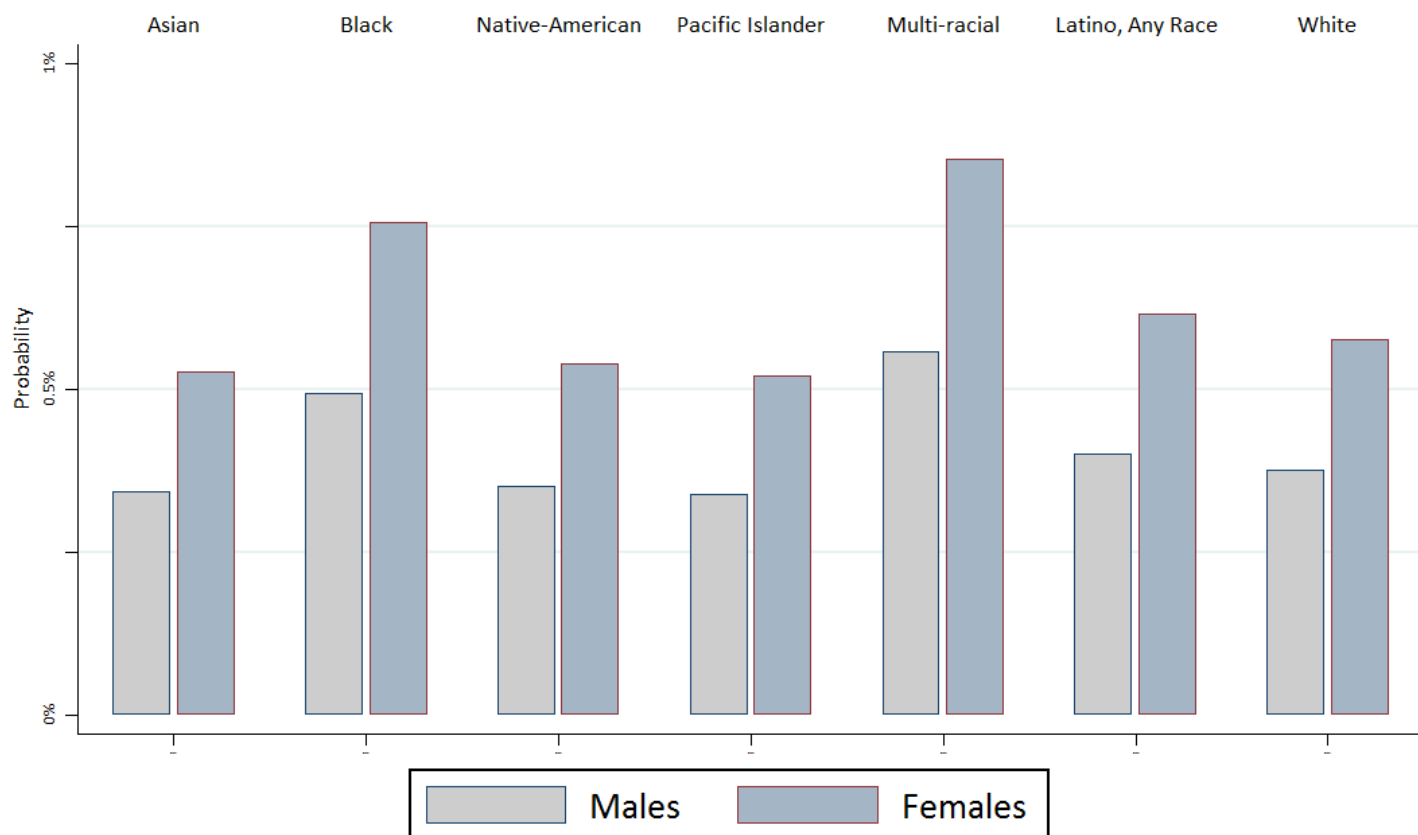


Figure 4 – Predicted probabilities from the overall sample Logistic Regression of whether a household moved in a given month. Each set of bars in this figure corresponds to a race or ethnicity, with one bar for male HoHs and one bar for female HoHs. These differences hold when using the King County Kirwan measure as well.

The unrestricted model (i.e. all predictors included) also shows that a higher person-to-rooms ratio predicts a higher likelihood of moving all else equal. Having income from any source—wages, benefits or any other source—decreases the likelihood of mobility, though wage income has the largest relative magnitude of effect. Lastly, with respect to starting neighborhood opportunity levels the models show a theoretically consistent effect that those already living in high or moderate opportunities are less likely to move¹⁴. The final model with all predictors included fits the observed data best as indicated by the BIC statistic, a measure of

¹⁴ Supplementary analyses with the overall sample where we specify starting neighborhood opportunity to interact with prior mobility finds that the "main" effects of both prior mobility and starting in moderate/high neighborhoods remain negative and significant, but a positive and significant relationship exists for the interaction term between starting in high opportunity and the level of prior mobility. This finding suggests that those households who do not move to high opportunity initially (especially those for whom it takes repeated moves) are more likely to move again—potentially in a downward trajectory.

how well a model performs that penalizes overly complicated models for not being parsimonious. Although most effects are consistent when using SHA-specific or KCHA-specific samples, a few differences are worth noting: longer tenures as a SHA household related to decreasing mobility (whereas in the overall data this was null effect), and Asian households in SHA were more likely to move on average. KCHA showed relationships consistent with those detailed in the overall sample.

RQ2: For those who move, does the opportunity ranking of destination neighborhoods vary by household and resident characteristics?

Figures 8a-8d display the descriptive statistics for mobility between types of neighborhoods (in terms of their opportunity scores) using the two calculations of the Kirwan index and the three different samples of household move data. The samples of data used to answer this research question comprise of all observed household moves as observations, allowing us to analyze the dynamics related to mobility between types of neighborhood origins and destinations, among other things. Each bar in the four sub-plots on the following page corresponds to a type of neighborhood *origin*, with the bar segmented by the relative frequencies of neighborhood *destinations* that were observed for the households who moved between 2008 and 2014. The number of moves from each type of origin are denoted next to the labels; in each sample, moves from low opportunity were the most common.

With respect to the overall sample in **Figures 8a and 8b (top row)**, both Kirwan indexes show that most moves for households starting in low opportunity are to another low opportunity neighborhood, though the King County calculation expects almost all moves from low opportunity to be low-to-low moves (88%). Moves from moderate opportunity show a 50-50 chance of moving to low opportunity vs anywhere else (using the either index), while moves from high opportunity see a majority staying in those neighborhoods amidst a non-trivial share (25-30%) of high-to-low moves. Looking at agency-specific estimates in **Figures 8c and 8d (bottom row)**, we find that the estimates correspond largely to the overall sample's estimates using the respective Kirwan index that the agency employs (for reference, the agency-specific plots are located below the overall sample plot using the same index). However, there are more high-to-high moves within the sample of KCHA household moves (about 68% compared to 62% overall), whereas SHA saw a relative paucity of these moves compared to the amount in the overall sample (43% compared to 51% overall). The estimates for moves from low opportunity neighborhoods are very comparable between each agency-specific sample and the overall sample using the same Kirwan index.

As before with the evidence about the frequency of mobility, these descriptive statistics provide us with baseline information to further analyze within a multivariate framework where we can give additional consideration to householder and housing characteristics' relationships in the mobility process. In this case, our models predict the destination neighborhood opportunity score for the sample of household moves overall and specific to each agency. To aid in interpreting these statistical models, we present the results only in terms of predicted probabilities and substantive effects (i.e. increasing or decreasing probability of moving to high opportunity). Since we have three potential outcomes (low, moderate or high) for these models, the predicted probabilities of the possible outcomes sum to 1.

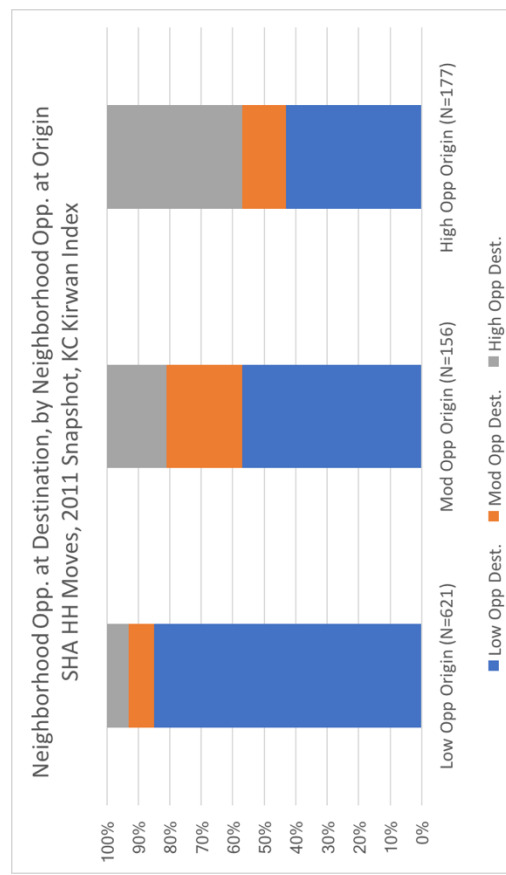
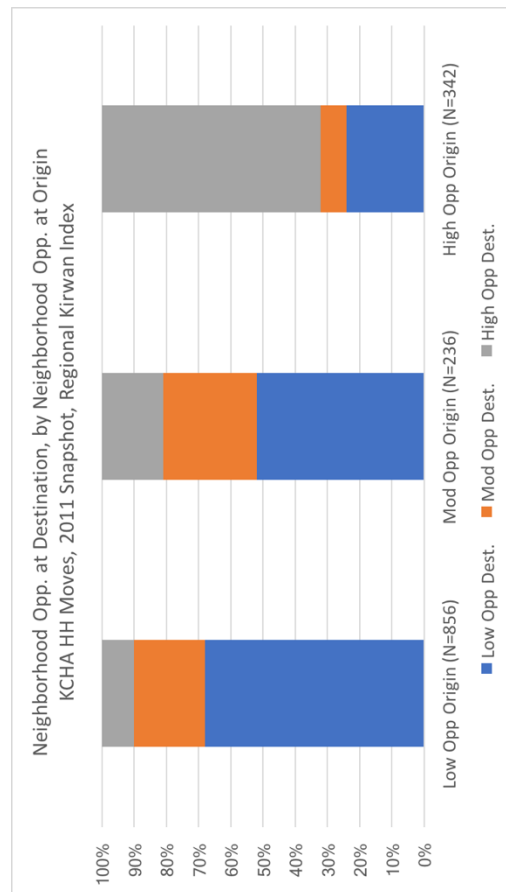
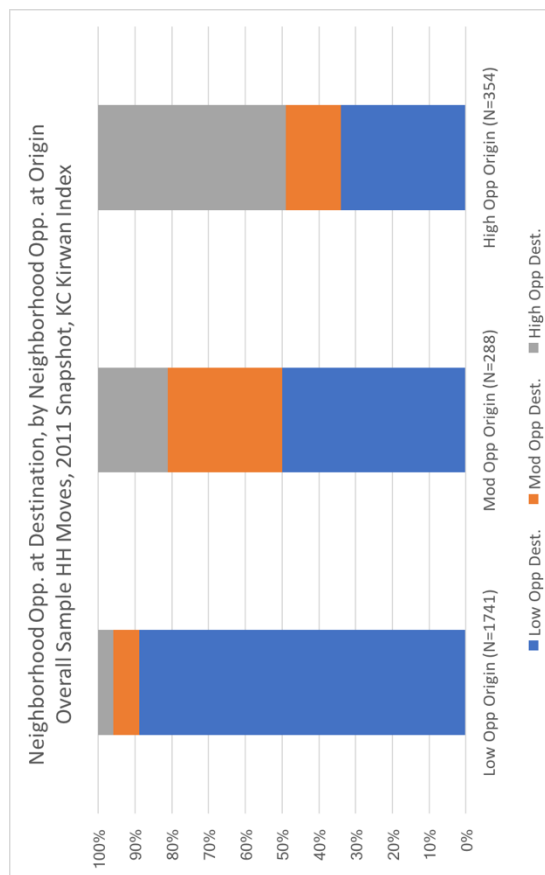
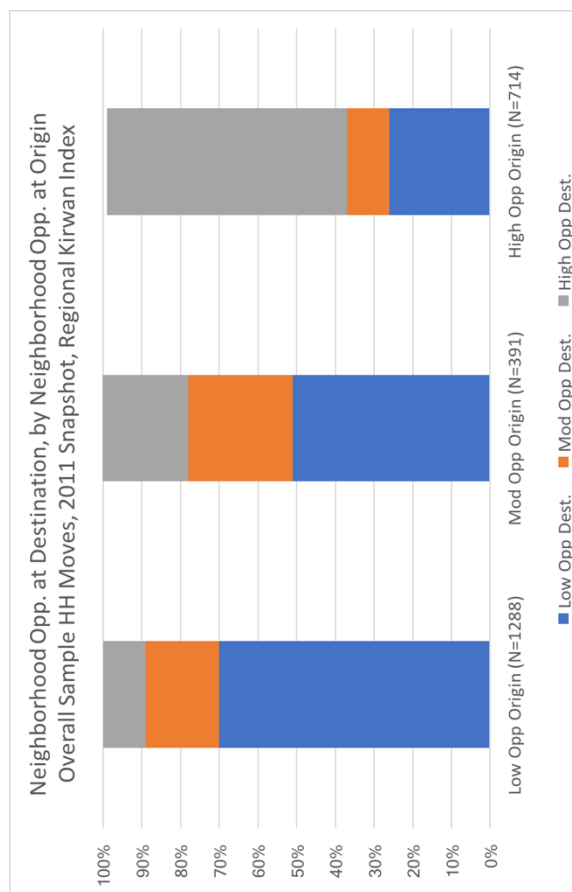


Figure 5a-8d – Relative frequency of mobility destinations, by the household's origin neighborhood opportunity score. The top two plots use the overall data, while the bottom two are agency specific.

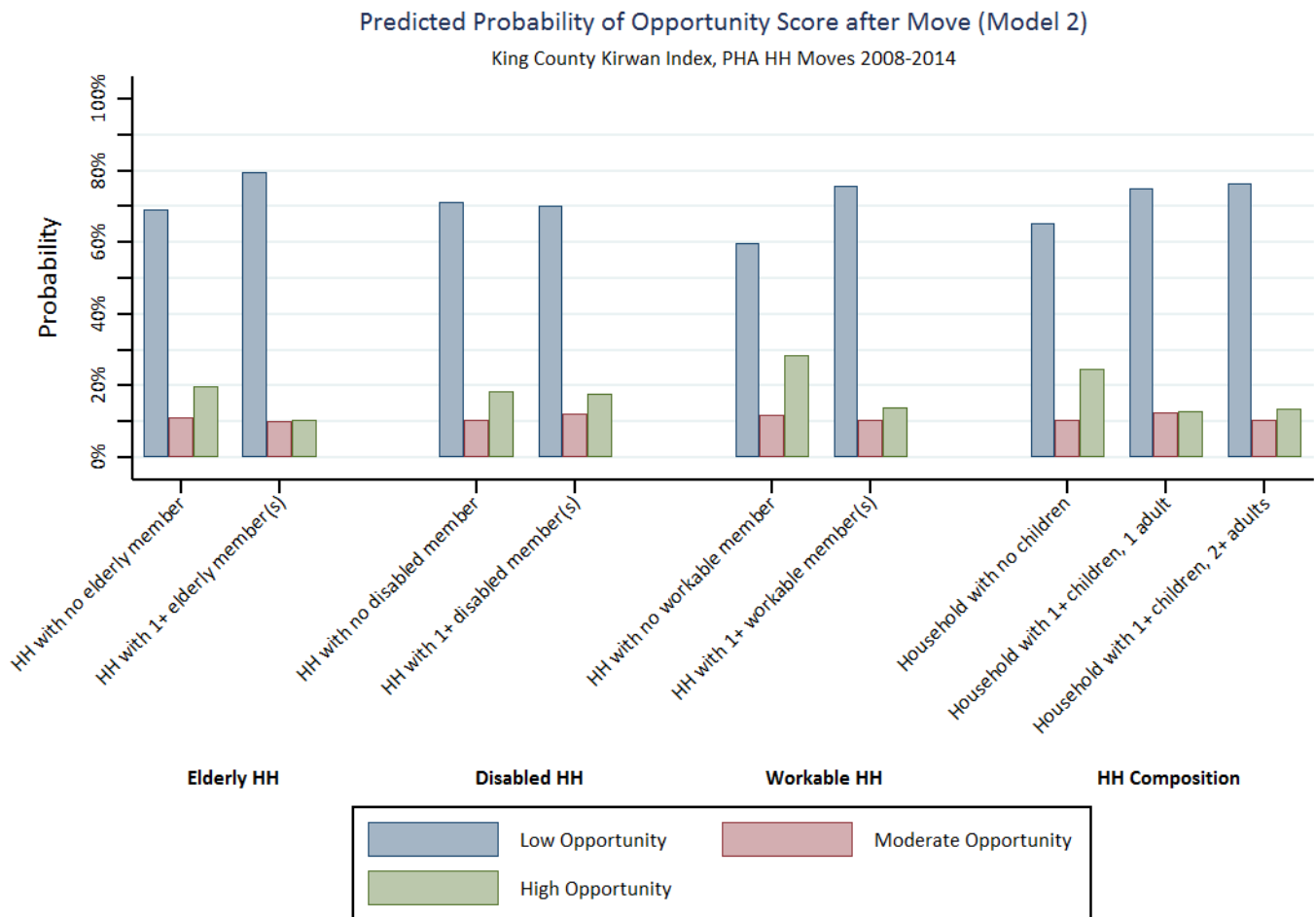


Figure 6 – Predicted probability of neighborhood opportunity score at destination, by key sub-populations using the overall sample of PHA data and the King County Kirwan index.

Figure 9's estimates come from a model using only sub-population statuses, the frequency of prior mobility and length of tenure as a PHA participant (since 2008) as predictors of the level of opportunity at destination. Notably, when using the King County Kirwan index the model predicts a move to low opportunity as most likely outcome index across all groups, with even higher probabilities among elderly, work-able and households with children. In each of these three cases, households which did not fall into the sub-population had slightly higher probabilities of moving to high opportunity. This picture changes somewhat when using the regional Kirwan index: the most common destination (i.e. modal move) remains a low opportunity except for those households with no children who are most likely to move to high opportunity (holding other variables equal); those households with an elderly member, work-able member or any children still see low opportunity probabilities exceeding 50% (though just barely). Although not pictured, the model also predicted a modest increase in the probability of experiencing a move towards low opportunity with each additional prior move.

Using the unrestricted model of neighborhood opportunity score at destination, we observe the following relationships between household and neighborhood characteristics and the probability of "moving to opportunity."

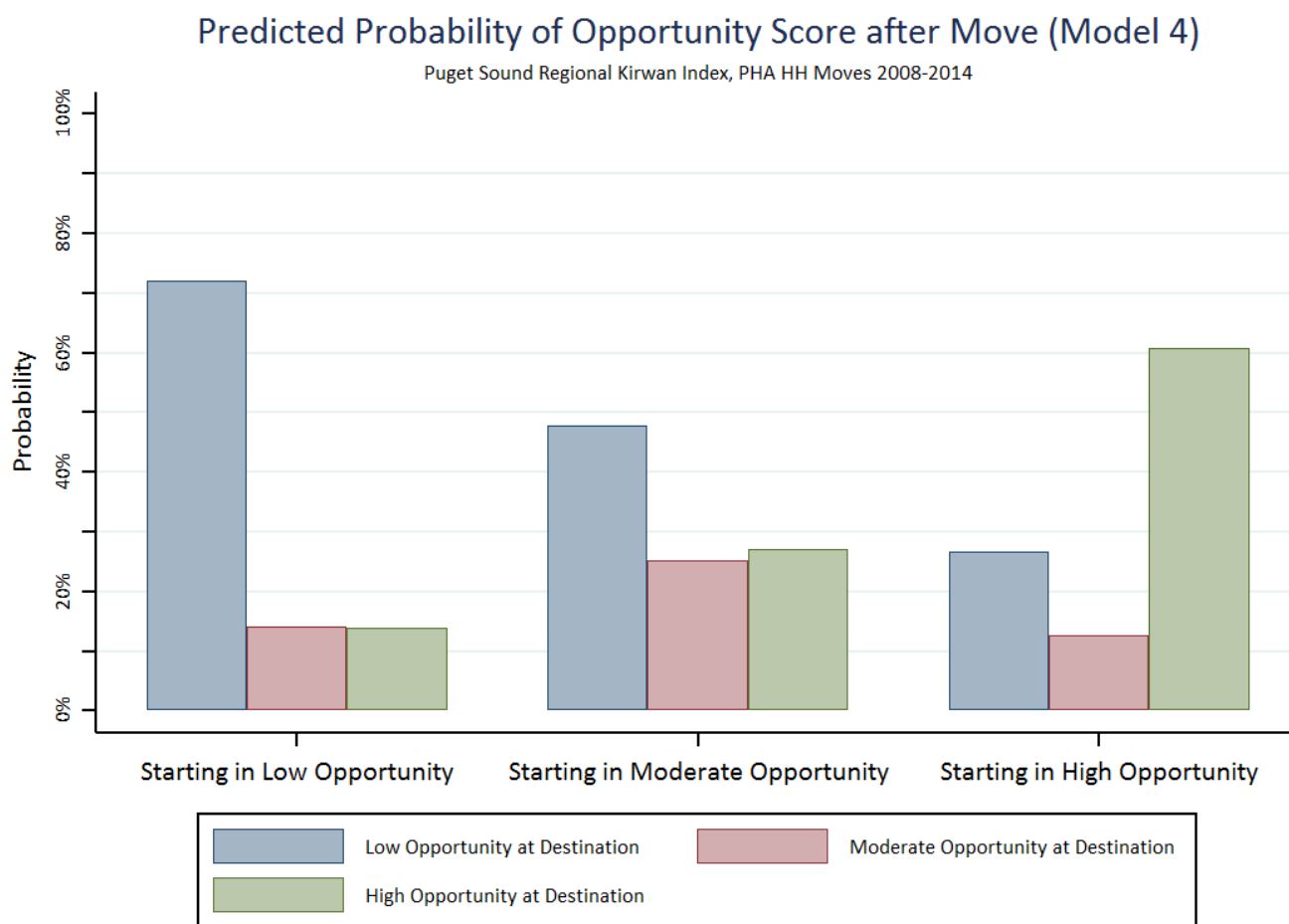


Figure 10 - Predicted probabilities of neighborhood score at destination, by starting neighborhood's opportunity score using the overall sample and Puget Sound regional Kirwan index.

Figure 10 depicts how prior neighborhood opportunity levels strongly predict differences in the neighborhood opportunity score at destination, even when using the slightly more conservative regional index. For a household starting in low opportunity, the model predicts a whopping 70% probability of moving to low opportunity holding everything else at its mean. Similarly, those starting in high opportunity are most likely to remain in high opportunity, though about a 20% probability of moving towards low opportunity remains even among the households for which this set of estimates applies. Supplementary analyses interacting prior neighborhood Kirwan scores by race finds significant conditional effects of prior neighborhood opportunity on destination neighborhood opportunity for non-Hispanic black-headed households—i.e. a weaker protective effect of already being in moderate or high opportunity, or alternatively, a stronger likelihood of downwards in terms of neighborhood quality for black households moving from high opportunity.

Other notable findings from the "full" models of neighborhood opportunity score at destination: a persistent negative effect (i.e. lower likelihood) of elderly and work-able households moving to high opportunity, though there were no differences in their likelihood of moving to moderate opportunity compared to non-elderly and non-work-able households. The decreased likelihood of moves being toward high opportunity that single-parents had in the restricted models and the effect of prior mobility were explained away by pre-move

neighborhood opportunity levels. This observation should not be taken to mean that these factors do not have salience as predictors of mobility or mobility trajectories; rather, a more appropriate interpretation would be that the strong structural effect of where one already resides matters might simply matter more for single-parent households and frequent movers. With this perspective, we keep in mind the time-ordering of how one's prior neighborhood itself depends on factors like household composition that may have impacted where the household initially settled (since the prior neighborhood scores "tap into" the accumulated dynamics of previous previous mobility processes). Female-headed households are less likely to move to high opportunity than male-headed households, as were Asian, Black and Pacific Islander-headed households compare to non-Hispanic white-headed households. Verified US citizens also saw lower probabilities of high opportunity moves. With respect to income, the actual *level* of gross individual income and tenant rents did not matter substantively, whereas the *presence* of income from any source (wage, benefits or any other source) did predict higher likelihoods of moves to high opportunity. As before with the regressions of whether households moved in each month, the models of opportunity score at destination with sub-populations, household and neighborhood characteristics included substantially improve fit (in terms of BIC) over the baseline models just including sub-population statuses. In KCHA, the income source variables had null effects, as did all the sub-population statuses. Within SHA, the estimates follow a pattern largely consistent with those described from the overall sample.

Conclusion and Discussion

This research uses a novel data set that combined KCHA and SHA data from 2008 to 2014, along with metrics from the Puget Sound Regional Council (from 2012) and US Census Bureau (2010) to describe the populations served by these two PHAs and to analyze group differences in the probability of moving—and if a household moved, whether they “moved to opportunity”. We find substantial group differences within these mobility dynamics—e.g. that the largest shares of PHA residents include households with one or more adult living with a disability, households with children, and households with at least one work-able adult, all factors which predicted higher rates of overall mobility in our sets of models.

Additionally, we find a variety of other characteristics associated with the likelihood of moving. All household types are associated with higher rates of mobility than their reference group counterparts, except for elderly households, which experience lower rates of moving. After introducing household and housing related controls, those households that have higher rates of past mobility, as well as younger-, female-, Black-, multi-racial, and US citizen-headed households also have higher rates of mobility. Having more income relates to a higher rate of mobility, as does moving from a unit in a low opportunity neighborhood rather than a high opportunity neighborhood. This last point is particularly important, given our important finding that those who move from low opportunity neighborhoods are also most likely to move to other units in low opportunity neighborhoods rather than upgrade to higher opportunity areas. This means that not only do those who live in such areas face any negative outcomes associated with higher rates of mobility, but this may also be compounded by a low likelihood of moving to a better neighborhood when they do move. Other factors that tend to increase the likelihood of a household moving to low opportunity neighborhoods include the presence

of elders, adults with disabilities, those who are work-able, children, Black, female, and older household heads, and income source. Limited differences in moving to moderate opportunity neighborhoods relative to low opportunity neighborhoods are explained by the combination of demographic, household, and housing characteristics.

This research provides an important foundation answering questions related to who among PHA residents are moving and, how frequently they move, and perhaps most crucially, who is “moving to opportunity.” It also highlights the need for future research into residential mobility among PHA participants, including those beyond the scope of this study (i.e. project-based voucher and public housing households). Additionally, qualitative research could unpack whether those who do not “move to opportunity” are indeed hoping to move to neighborhoods that qualify as “high opportunity” but are unable to, or whether they find “lower opportunity” neighborhoods more appropriate for any of several reasons (location of support networks, disinterest in living in areas where they might face discrimination, etc.). Research along those lines might ask if those who move frequently are changing residences or moving for other reasons. as the housing market grow increasingly competitive and unaffordable. Lastly, further linkages could be developed surrounding those households which moved from SHA’s to KCHA’s jurisdiction in terms of their composition and potential differences from the average tenant-based voucher household. Further research into those dynamics might address questions about whether this group is being displaced or moving to the King County’s suburbs in search of opportunity or greener pastures. Answering these and other questions may help bolster the administration of housing subsidies and indirectly improve the well-being of households served by PHAs.

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GLEA PROGRAM

Mid-Program Summary (2014-2016)

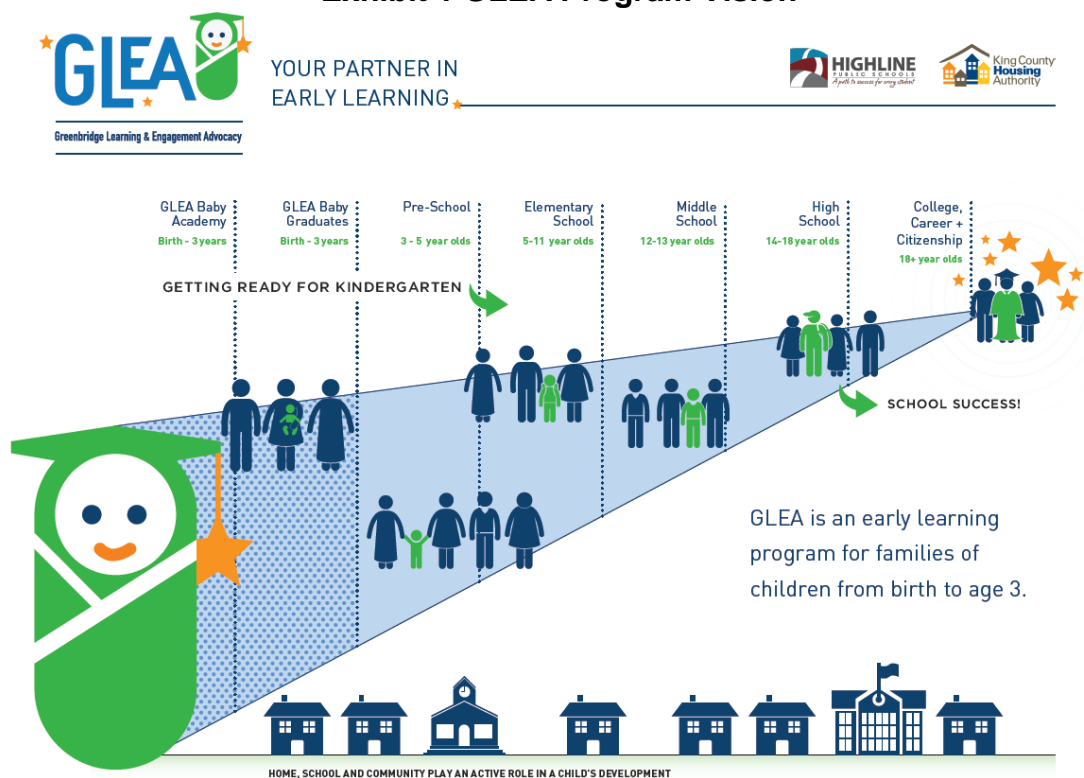
This summary documents the work of the GLEA program in its first years of implementation in the Greenbridge community of White Center, WA. It draws on program documentation, interviews, monitoring and evaluation data to provide an understanding of what the GLEA program did and learned in its early years.

1.0 BACKGROUND

1.1 Program Description

The Greenbridge Learning and Engagement Advocacy (GLEA) program is a pilot program implemented in partnership between the King County Housing Authority (KCHA) and Highline School District's White Center Heights Elementary. The pilot, funded by the Bill and Melinda Gates Foundation, aims to improve connections between early education supports, elementary schools, and families with young children living in public housing. It also aims to increase the numbers of KCHA children in formal early education. The program focuses on building these early connections because they are essential to kindergarten readiness and school success. The program vision is summarized below.

Exhibit 1 GLEA Program Vision



Key outcomes for the pilot program are improved knowledge and practice of early childhood development support skills at home for KCHA families and improved child development and kindergarten readiness for children ages birth-to-three within those families. The program also aims to strengthen commitment among partner organizations in White Center to achieve these outcomes.

1.2 Program Design

The program is designed to support the establishment of families' relationship to the school when their children are infants. Families are recruited from the eligible pool of all KCHA families with children aged birth-to-three. The GLEA family advocate will use KCHA enrollment data, and referrals among residents and from community partners to identify eligible families. Families, once enrolled with the family advocate, begin to receive home visits prior to the Baby Academy. The first home visit includes child development assessments to establish a baseline of developmental benchmarks for the child.

Twice a year, in the fall and spring, the GLEA program holds a 9-week Baby Academy for newly enrolled families (those enrolling since the previous Academy). The Academy consists of 9 weekly workshops, with participation incentives including Highline Community College course credit for parents or STARS continuing education credit for child care providers, and meals to encourage attendance. During the 9 weeks of Baby Academy, families also receive weekly home visits to complement the curriculum. Post-Academy, the GLEA family advocate checks in with families monthly. They also have access to quarterly graduate community-based field trips with other GLEA families until their child enters preschool or kindergarten. These graduate meetings are by Baby Academy cohort in the first year and may later split into groups by the children's developmental stages as the program produces more graduates.

2.0 PROGRAM NARRATIVE

In this section we provide an overview of the establishment of GLEA.

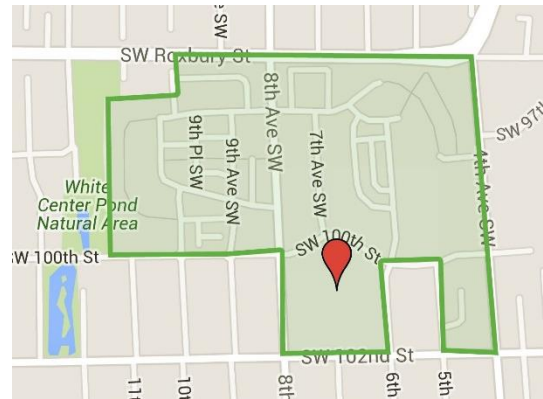
2.1 Impetus

The GLEA program was conceived as a way to support children and families in KCHA residences before they enter kindergarten. Fall 2013 TS GOLD data showed that only 21% of Greenbridge students entering kindergarten at White Center Heights Elementary met benchmarks in all the developmental domains of social emotional, physical, language, cognitive, literacy, and math. Students with early learning gaps are likely to remain behind through their school career. The data indicated a need for Birth to 5 support for KCHA families to ensure school readiness, an objective of both KCHA and the school district.

Aside from the demonstrated need to fill the gap in early learning, a KCHA-HPS partnership around Birth to 5 support in Greenbridge in was also supported by the following conditions:

- **Leadership.** The superintendent at Highline Public Schools was invested in early learning, parent connections, and community partnerships. These factors were also priorities of the school leadership of White Center Heights Elementary Schools where the program could be located.
- **Geography.** White Center Heights Elementary School is located within KCHA's Greenbridge housing development. Proximity ensures overlap between the public housing residences and the elementary school's catchment and eases transportation demands.
- **Community partnerships.** White Center has a rich community identity. Access to community partners and a local tradition of community provided social services would be key start-up assets for the GLEA program.

Exhibit 2 White Center Heights Elementary Location within Greenbridge



2.2 Early development

Early brainstorming for GLEA began in late November 2014. The GLEA program was further developed by a broad group of stakeholders in the White Center community. With the charge of developing a program to serve birth to 5 year olds in the community, the community partners reached out to several sources for inspiration and advice.

- Stakeholders from the following organizations were consulted and involved in the brainstorming process:
 - KCHA
 - Highline Public Schools
 - King County Public Health
 - Child Care Resources/Voice of Tomorrow
 - White Center Family Development Center
 - Southwest Youth and Family Services
 - White Center Community Development Association
 - Women, Infants, and Children
 - Educare
- The team conducted a learning visit to the nationally-acclaimed Harlem Children's Zone in New York. While the population served is different in many ways from that in White Center, the visit yielded a potential model and best practices for building and sustaining a quality program. The team also took away the concept of creating leaders from within the community.
- In June 2015, the team conducted three community conversations with KCHA resident families and day care providers. These were informal discussions about perceptions about early learning to assess current attitudes and perceived needs in the community. The conversations had linguistic support for Somali, Vietnamese, and Spanish-speaking residents.

The resulting core concept of home visits coupled with a 9-week Baby Academy and continuing support through kindergarten entrance was established. More on the resulting program design is in Section 1.2.

Once the core concept and a full-time program advocate (Camille Churchill) were in place, the core team of representatives from KCHA, WCHE, and the program advocate carried forward the remainder of first year program development, implementation, and learning.

2.3 Implementation and Learning

Further program development activities in 2015 included:

- **Evaluation design**
 - BERK Consulting was asked to develop an evaluation plan to document and learn from implementation in the first years of the GLEA pilot.
 - The team reviewed available developmental assessments and screening tools to use in the program.
 - The team also helped develop data collection instruments that would capture key intended outcomes.
- **GLEA family recruitment**
 - KCHA's database of families was a primary source for recruitment. Resident families with children under 5 years old were identified and contacted from this initial list.
 - Referrals from contacted families was another effective recruitment method.
 - Recruitment also stemmed from community partner outreach
 - GLEA branding and logo work was undertaken to convey an inviting and professional identity with families and partners
- **Home visits**
 - Once enrolled, families began receiving pre-Baby Academy Home Visits
 - The first visit would include an ASQ screening
 - The second visit includes a parent pre survey
 - The family advocate developed and continues to develop several other tools and materials to structure these visits.
- **Baby Academy curriculum design and teacher/partner recruitment**
 - The curriculum at Harlem Children's Zone and the requirements for the Highline Community College Education 293 course were adopted as models for the development of the Baby Academy.
 - The program team arranged with Highline Community College to award GLEA Baby Academy attendees 3 college credits for their participation.
 - The team adopted author Tracy Cutchlow's Zero to Five book as a common resource for program participants. All families in Cohort 1 received a copy of the book.
 - RFPs were issued for instructors for each Academy module
- **Incentives, child care, and food planning**
 - Incentives were a key component of participation and engagement in the Harlem Children's Zone model. The team tailored incentives that best fit this population and integrated them with presentation themes
 - The process for arranging and purchasing incentives had to be established.
 - Catering options for Baby Academy were assessed and the team initially worked with Highline Public Schools Nutrition Services. For the latter part of the academy the team hired a caterer who was a parent in the school community and prepared food honoring tastes and religious needs of the diverse community
 - Child care for older children was a key component of participation and engagement. The team contracted with SW Boys & Girls Club to provide enriching activities during Baby Academy.

- **Baby Academy**
 - The first Baby Academy took place from September 19 to November 14, 2015 on Saturday mornings. After each meeting the team held a debrief session and troubleshooting adjustments and improvements were made from the first Academy session on.

In 2016, after the first cohort of GLEA baby academy graduates, the team continued to develop and implement the program as described above (the second Baby Academy took place from March 24 to May 24, 2016 on Tuesdays after school), with the addition of:

- **GLEA Graduates Engagement**
 - Field trips and graduate meetings with the graduates of the first cohort.
- **Expansion Planning**
 - Discussions of the possibility of expanding the program to include nearby Mount View Elementary school began

3.0 PROGRAM SUMMARY

Who We Served

The first GLEA cohort consisted of 17 families with 26 children aged three and under (twenty initially enrolled, but did not complete the program). All were residents of the KCHA Greenbridge community. The majority of parents were born outside the United States, from Ethiopia, Somalia, Vietnam, Colombia, and Iraq.

The second cohort again served KCHA residents in the Greenbridge community with children of eligible ages. Like the first, a large proportion of families hailed from East Africa. The two cohorts are illustrated in basic demographics below.

Exhibit 3 GLEA Cohort Profiles

	Fall 2016		Spring 2016		Total Served	
Total Families	20		22		42	
Total Women	20		22		42	
Total Men	17		17		34	
Total Children	30		27		57	
Children Age (0-3)	30	100%	17	63%	47	82%
Children Age (4-5)	0	0%	10	37%	10	18%
Female	13	43%	19	70%	32	56%
Male	17	57%	8	30%	25	44%
Black	22	73%	15	56%	37	65%
Mixed	0	0%	6	22%	6	11%
White	2	7%	3	11%	5	9%
Asian	6	20%	0	0%	6	11%

What We Did

Recruitment and Inclusion

Participants enrolled between April and August of 2015. Recruitment activities included visits from the family advocate, flyer distribution at locations such as the Women, Infants, and Children office, and attendance at community events such as the White Center Promise celebration on August 28, 2015.

The program easily met its target number of twenty families.

- A few families enrolled for home visits but did not attend Baby Academy. In future cohorts, the program will only be available to families that can commit to both the home visits and Baby Academy and receive the full intervention. Subsequent Baby Academies will be on a different day of the week and time.
- Language was anticipated to be a barrier to participation. To overcome this, the program invested in translation and interpretation services. However, some families were reluctant to have both an interpreter and a family advocate in their home. As trust was built between the family advocate and the family, language proved in some cases to be a smaller barrier than initially anticipated.
- In-person interactions and family-to-family referrals were some of the most effective means of recruitment according to information collected at enrollment about how families found out about the program.

Home Visiting

The first home visit includes an Ages and Stages screening questionnaire to assess the child's development and additional enrollment or intake information. A pre-Baby Academy parent survey of knowledge, practices, and behavior is administered at the second visit or later. Regular home visits are structured to include:

- A discussion of triumphs and concerns
- A discussion of today's goal in a developmental area
- An adult activity
- A baby activity in alignment with learning cards
- Family advocate developmental observations in alignment with TS Gold.


The family advocate spent nearly 160 hours in home visits (not counting preparation time) between June and December 2015.

- Eleven families in Cohort 1 had multiple children under four years old so home visits were conducted with the whole family rather than with individual children.

The family advocate stories reveal some concrete examples of the level of trust she built through home visiting families and associated changes in behavior:

"One mom has 3 kids, she is totally overwhelmed by them. [On the first visit] the kids all ran out to the street and she's yelling 'stop stop!' I said 'You can stand on the stairs or in the house.' She said, 'You're gonna be my person and I will have you.' It was amazing because I saw total buy in. And right before I went out [on medical leave, post-Baby Academy], I had a home visit - and she's in the kitchen making pancakes with the little kids and she never would have done that before because kids make messes etc. It was a total change in what she thought kids can do. You can tell that she's trying to do what we learned. It showed so much more confidence...and I thought that was so beautiful." – GLEA family advocate

Exhibit 4 Sample Learning Card

Learning Card	
Topic: My Body	Goal: Communication
Games: Look in the Mirror—sit your child on the counter facing the bathroom mirror. Encourage your child to touch and "talk" to the child on the other side of the mirror. Point to eyes, ears, nose, mouth, etc. Smiling and laughing are fun too!	
Exercising— lay child on his back. Give different commands, like "arms up!" "touch your leg" Ask them to repeat what they are doing.	
Fingerplay/song – Fingers	
Fingers like to wiggle waggle, Wiggle waggle, wiggle waggle, Fingers like to wiggle waggle On your head! ...your knee, your toe, your nose, ect.	
	

Baby Academy Workshops

The 9- week Baby Academy was structured to build the core parenting competencies shown in **Exhibit 5**.

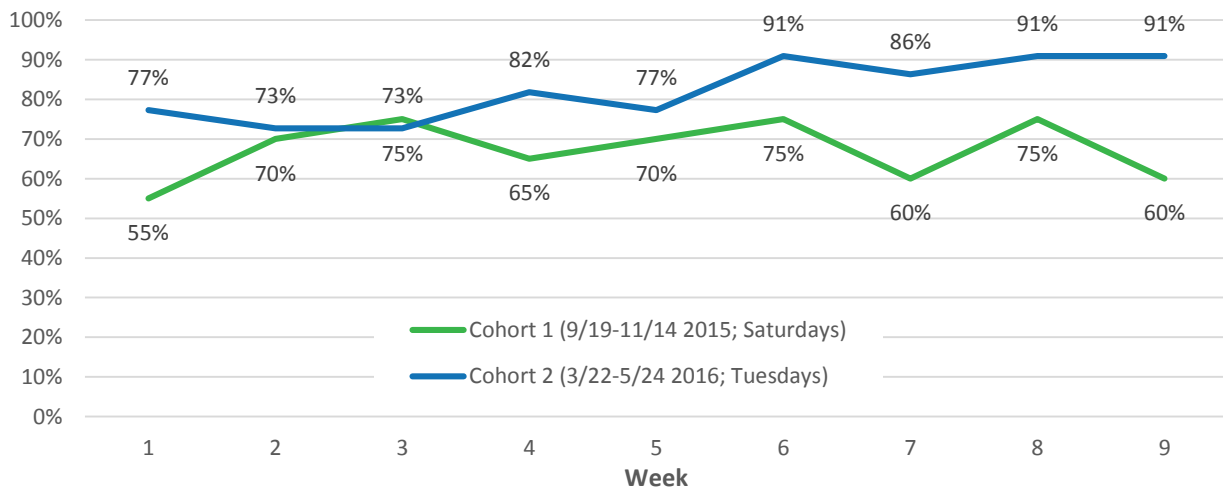
Exhibit 5 Map of Baby Academy Sessions to Core Competencies

	Week								
	1	2	3	4	5	6	7	8	9
0-5 touchpoints	Love	Sleep, Eat, and Potty	Move	Discipline	Discipline	Talk	Connect	Play	Slow-down
Identify developmentally appropriate child behaviors (WSCC)					x				
List and describe positive guidance techniques for child birth-adolescence	x			x			x		
Demonstrate positive respectful culturally responsive interactions	x		x		x				
Create a model daily schedule, routine and environment that support for attachment, self-help, relationship building and exercising executive function	x	x		x		x		x	
Develop strategies to promote social emotional competencies and positive sense of self	x			x			x		
Compare and contrast at least 3 approaches to guiding young children's behavior				x	x		x		

- Expert speakers from the region are contracted to run the sessions. These include:
 - **Kellie Morrill**. P-3 Campus Director at Educare, the Seattle campus of a rigorously evaluated early education model designed to narrow the achievement gap for low-income children.
 - **University of Washington Institute for Learning & Brain Sciences (I-LABS)**. An interdisciplinary center dedicated to discovering the fundamental principles of human learning, with a special emphasis on early learning and brain development.
 - **Sound Discipline**. A non-profit organization that helps adults connect with youth and address the root causes of challenging behavior through a strengths-based, research-based approach.
 - **Suzinne Pak-Gorstein, MD, MPH, PhD**. Medical Director of the Harborview Pediatric Clinic, which cares for refugee children and other low-income families.
 - **Voices of Tomorrow**. A non-profit organization for providing East African culturally responsive early childhood education via professional development, community engagement, and empowerment.
- Baby Academy attendance varied from 60% to 80% at any given session in the fall of 2015, and between 73% and 91% in the spring of 2016. The grant team observed consistent attendance from a core group of families (14 parents attended 7 out of 9 sessions) in both cases.
 - Attendance by fathers at the first Baby Academy was very limited, with families typically represented by the mother. One father attended the weekly sessions consistently.

- One family moved out of Greenbridge during the course of the program and did not attend Baby Academy.
- During Cohort 1, the sessions were conducted on Saturdays. The program team received feedback that indicated that a weekday evening might be a more convenient time for families to attend. The Spring 2016 Baby Academy took place on Tuesday evenings and enjoyed generally higher attendance rates.
- Inclement fall weather, especially on October 31 (Halloween) was seen a likely deterrent for attendance in the fall cohort.
- In Cohort 1, a few families had signed up interested in receiving home visits, but not intending to attend Baby Academy. In Cohort 2, the team has raised the expectation that Baby Academy attendance is required for participation in the program, and implemented this policy with rigor. Two parents had to drop out of Cohort 2, and one parent attended a “make-up” session to remain engaged and continue receiving home visits.

Exhibit 6 Weekly Baby Academy Attendance



- In Cohort 1, the evaluation tool for sessions was a written feedback form rating each individual speaker on scales of 1-5 on several dimensions. Parents were overwhelmingly positive about all speakers with all rated 5. This tool was discontinued in Cohort 2 in favor of more informal qualitative feedback from parents.
- Qualitative interviews provided more nuance about favored programs:

“As far as the sessions go, I think I really liked learning about communication and language development because in our household, we are raising a bilingual family, we got a lot of good information from the teachers that day.” – GLEA father, 36, Colombia

“[My favorite learning was] Not only your kids, yourself. How you handle it, how you calm down, how you breath. It just changes your life. Thank god we got this opportunity...Don't push too much, don't have too much stress, give yourself a break. If you don't control yourself, you can't do anything, you just pass out.” – GLEA mom, 43, Ethiopia

“3 weeks ago, we had a learning for discipline. The one thing I learned a lot. I learned lot of stuff at Baby Academy. But everybody like something a lot (more than the others). I like

discipline. A lot of parents think that they got to be strict...but maybe they go outside and it's not good because that is not how the world is. A lot of parents thinking everything on time, everything supposed to be rules, rules, rules - but the kids sometimes, they don't want to. Sometimes if they are doing bad stuff, they are still learning good stuff. It's not good if the parent is very soft, ok do whatever you want. The parents have to be balanced.” – GLEA mom, 42, Somalia

- When asked about constructive feedback for particular sessions, parents remained overwhelmingly positive. Two parents had constructive feedback, not about the content of the session, but the way the information was presented. One parent had hoped for more willingness from a presenter to engage with parents' questions, and another had the following observation:

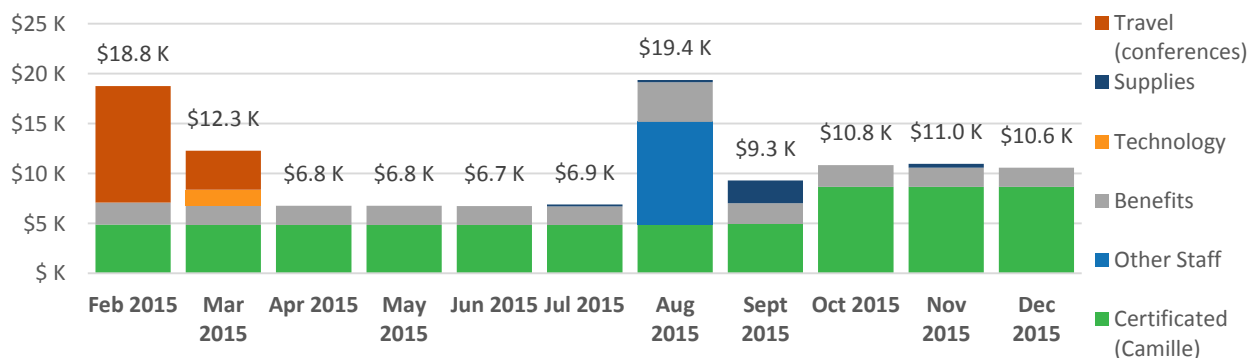
“There is one thing that I actually had the opportunity to discuss with one of the teachers or presenters, She's actually a researcher at UW I believe. It was a little surprising for me to hear on their speech that they keep talking to moms. And here I am, I'm a dad, I wouldn't expect less of me. I know I shouldn't measure every family on the same standard, but the message that is being put out it is for moms. I feel left out. I get it if your audience is 99% females and moms, you would do that. But even if we [men] are not there, tell moms 'you're not alone'. Fathers need to participate. The role of the dad - that needs to be revised. The message that is being handed out is still very much 'hey moms, you're in charge' in order to level it, we need to invite, we need to pull the dads in and get them to participate.” – GLEA father, 36, Colombia

Program Resources

Exhibit 7 illustrates the costs of the start-up activities for the GLEA program. Total spend from February to December 2016 was about \$96,000, or \$3,200 per participating child. As a point of comparison, Harlem Children's Zone, operating at mature scale, spends approximately \$3,500 per child.

- In February 2015, the visit to Harlem Children's Zone involved several stakeholders.
- Recruiting and home visits by the certificated staff comprised most of the work to July 2015.
- Spending on supplies for Baby Academy, including incentives, began to appear in August and September.
- Child care staff costs for the Baby Academy are a major driver of costs in addition to the certificated teacher.

Exhibit 7 2015 Program Spending



Family Advocate Time

The family advocate, Camille, is a certificated teacher who is the lead staff for the program. The family advocate's role comprises many activities crucial to the success of the program. These include:

Program development	Administration / Planning	Family work	Recruiting
<ul style="list-style-type: none"> • Developing incentives • Creating curriculum and materials • Background research • Developing program partnerships • Developing Baby Academy partnerships • Program Other 	<ul style="list-style-type: none"> • Planning meetings (GLEA team) • Timesheet/Updating Family Records • Partner call/meeting • Sick leave/Vacation 	<ul style="list-style-type: none"> • First home visit (+ assessment) • Regular home visit • Family phone calls • Baby Academy meeting • Post-Academy check-in • GLEA Graduate meeting • Follow-up assessment • Family Other 	<ul style="list-style-type: none"> • Recruiting visit • Recruiting call • Recruiting through partners • Recruiting Other

The distribution of advocate hours leading up to and including Cohort 1 is shown in **Exhibit 8**.

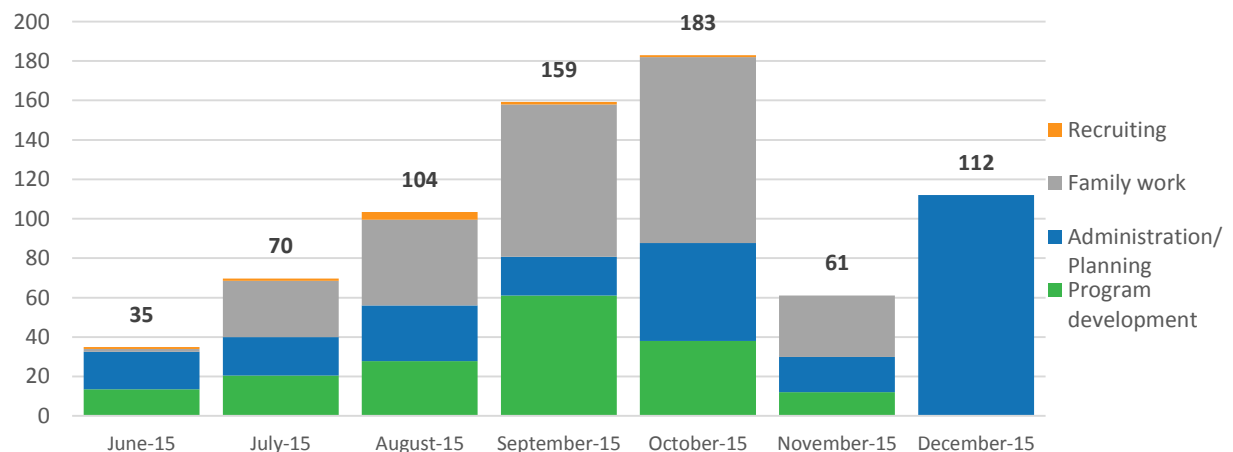
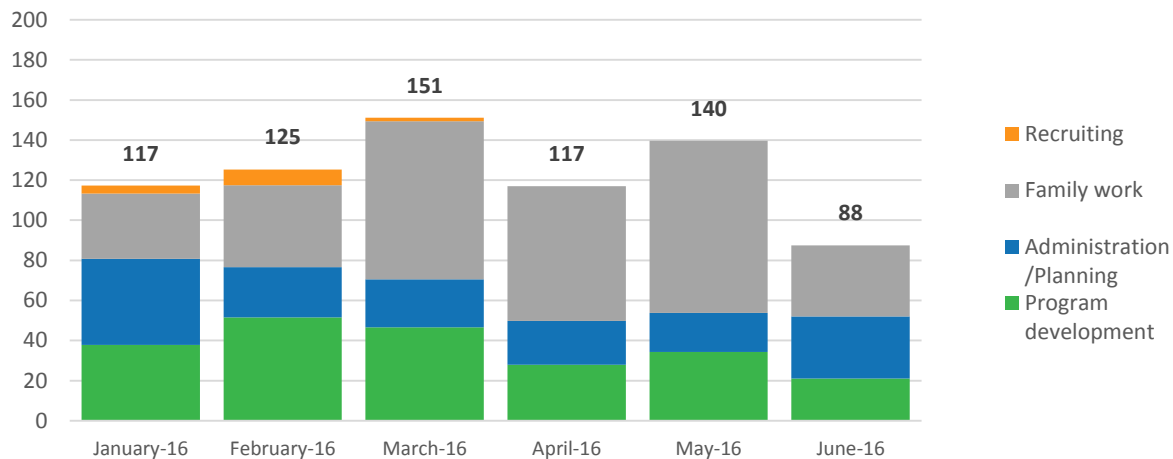


Exhibit 8 Distribution of Cohort 1 Advocate Hours

- Camille started out on a part-time basis in June while she was transitioning from a previous role as a teacher at White Center Heights Elementary school.
- Program development activities ramped up and peaked in September. Similarly, family work, which includes home visits as well as Baby Academy meetings ramped up over the early months and peaked in October.
- Camille took administrative sick leave in November and December of 2015.

Exhibit 9 Distribution of Cohort 2 Advocate Hours (monthly hours)



- In Cohort 2, program development and family work continued to constitute the lion's share of the family advocate's work, though the monthly workload was more smooth and did not peak as drastically as Cohort 1 during the Baby Academy. The Baby Academy itself was planned to be shorter and did not incorporate breakfast and lunch times as the Cohort 1 did.

Recruiting

Recruitment was a relatively minor part of the family advocate's time. Recruiting efforts included calls from the KCHA database list, distribution of flyers, and appearances at community events. The family advocate also successfully recruited through referral and informal conversations. Across both cohorts, recruitment relied partly on KCHA data on eligible families, but also heavily on the family advocates relationships and presence in the housing community. Parents often report being approached by Camille in other venues, or referred by other parents.

"Oh my god, my friend they told me about [GLEA]. What they learned, I thought that I was a 100% mom. But I thought again, I should learn more, you know? Every day is...life-changing for some of us. We have a bunch of stuff to do to bring up those kids, you know? So that's why I decided to join - to gain more knowledge." – GLEA mother, 36, Kenya

Family Work

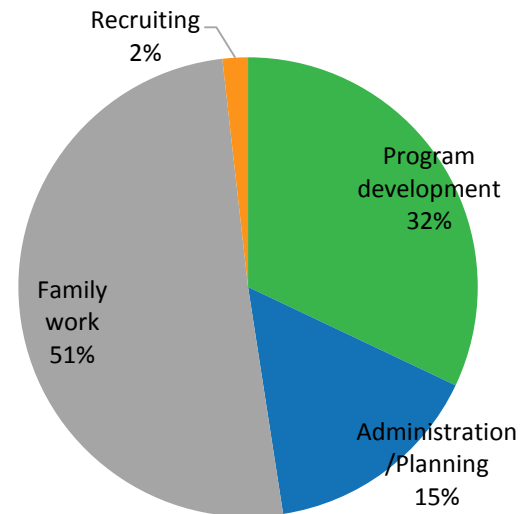
Family work (including Baby Academy) accounts for over half of the family advocate's time. Of that, over half of the family work time is made up of regular home visiting. Each participating family received an average of 7.3 hours of individualized family advocate time, mainly through scheduled home visits, but occasionally through responding to ad-hoc parent inquiries and family celebrations.

- Home visits require preparation time and at times arrangement with an interpreter.
 - Over the course of the program, the family advocate found that in-home interpreters sometimes became unnecessary or were unwanted by the families for privacy reasons.
- The family advocate's success in building fruitful relationships with the families was particularly evident in parent interviews. The family advocate was available and approachable, assets for both recruiting and the program implementation.

"God Bless America for Ms. Churchill. She's changed my life, my home life. Because she always when I ask for help, she says 'okay why not' she just drives, she comes on time to my home and I think 'I can handle it.' I just call her the Angel. This is a big life, with my kids. I just thank god I'm here." - GLEA mother, 43, Ethiopia

"Camille is my favorite, she is wonderful, never tired from anyone. I think she's wonderful. I can't put my words to describe her. I met her at the school one day when I was dropping off my 6 year old and another family was talking about Baby Academy and I heard about it, and I went to her and said I want to be a part of it because I want to learn. I wish I learned before, I wish there was a Baby Academy before, before my babies." - GLEA mother, 35, Somalia

**Exhibit 10 Family Advocate hours
(June 2015 - June 2016) minus sick leave**



Program Development

Program development overall accounted for about 32% of the family advocate's time. Of that, large portions of program development hours were spent on curriculum and materials development, developing incentives, and developing program partnerships. As the program matures, these activities are unlikely to continue requiring such a significant portion of the family advocate's time. For example, the RFP documents and process for Baby Academy speakers and the general incentive framework is already in place.

Administration/Planning

Administration and planning time includes grant team meetings, invoicing, and data collection and entry tasks associated with the evaluation. These hours made up about 15% of the advocate's time in 2015-16.

The family advocate role was originally envisioned as a 35 hour a week position. As the advocate time data shows, peak times just prior to and including Baby Academy push the hourly load beyond 140 hours a month. During this time, the family advocate was in high demand for program development and working with a full cohort load of home visits. With the program considering expansion and replication, a

redistribution of the family advocate's assigned administration and program development duties could allow them to focus effort on family work.

Preliminary Outcomes

Child Development Outcomes

- The first home visit screenings for Cohort 1 were conducted on a rolling basis as families entered the program. The earliest one was on May 1, 2015 and the last was on October 30, 2015 after the Baby Academy was underway. The screening tool, Ages and Stages Questionnaire, is a widely used and researched tool to identify delays or disabilities early in a child's life. Variations of the tools are calibrated to expectations for each age and it is designed to be quickly completed by a parent or guardian.
- With a set workflow for doing assessments on the first home visit, the ASQ was implemented in a much more compact timeframe in Cohort 2, from January 5, 2016 to March 21, 2016. All children had completed the assessment prior to the first Baby Academy Meeting.

ASQ Result	Count (%) of Cohort 1	Count (%) of Cohort 2
Typical in all domains	19 (63%)	14 (56%)
Delay in one domain	6 (20%)	9 (36%)
Delay in two domains	3 (10%)	1 (4%)
Delay in three domains	1 (3%)	1 (4%)
Delay in four domains	1 (3%)	0 (0%)

- In Cohort 1, 17% or five babies were identified as potentially delayed in each domain (Communication, Gross Motor, Fine Motor, Problem Solving, Personal-Social). In other words, the types of delays in the Cohort were not concentrated in any particular domain.
- In the initial screening, Cohort 2 babies tended to have problem solving and communication delays more so than the other domains.

ASQ domain	Count (%) of Cohort 1 below expectations	Count (%) of Cohort 2 below expectations
Communication	5 (17%)	3 (12%)
Gross Motor	5 (17%)	1 (4%)
Fine Motor	5 (17%)	2 (8%)
Problem Solving	5 (17%)	6 (24%)
Personal-Social	5 (17%)	2 (8%)

- TS Gold Assessments were conducted in the first half of February of 2016 with one in late November 2015. TS Gold is the basis of Washington State schools' assessment of kindergarten readiness known as WaKids. Like the ASQ, it assesses multiple domains of child development benchmarked to age. Unlike the ASQ, it is an in-depth observational tool completed by a trained professional to fully assess where the child is in development, rather than quickly screen for potential delays. In future cohorts, GLEA babies will be observed using TS Gold from enrolment onward. For Cohort 1, however, only one observation (post-Baby Academy) is currently available.

TS Gold Result	Count (%) of Cohort 1
Typical in all domains	14 (47%)
Delay in one domain	6 (20%)
Delay in two domains	2 (7%)
Delay in three domains	4 (13%)
Delay in four or more domains	4 (13%)

- TS Gold assesses on seven domains. The results are shown below. Literacy and math are the main areas of need.

TS Gold Domain	Count (%) of Cohort 1 below expectations
Social-Emotional	7 (25%)
Physical	0 (0%)
Language	8 (29%)
Cognitive	5 (18%)
Literacy	11 (39%)
Mathematics	9 (32%)

- 2 children from Cohort 1 were referred for early intervention services. One is now accessing services through Northwest Center and one has been connected with Child Find an early childhood special education screening and referral service. 3 children from Cohort 2 have been referred for early intervention services.
- Qualitatively, parents report they are realizing benefits from consistently applied rules and discipline in the home. They are also observing changes in their children's behavior and attitudes about learning.

"And my baby who is now 3 and a half...the more Ms. Churchill came home and gave us books to read, the more I see...she is so interested in learning. The difference is because she thinks like she is in school. Like she has a 'teacher' who comes to the home. Like, she's, when the other kids get their homework, she will get a book and a pen and she will start drawing stuff and coloring stuff. And she will say "Mom, I'm done with my homework." In her mind, she is like she is in school basically. She'll also tell me "Tomorrow is Tuesday, are we going to the Baby Academy? I need my uniform" You know? [laughs] That small t-shirt, the white one." – GLEA mom, 36, Kenya

Parent and Family Outcomes

- Parents reported specific changes in at-home practices based on Baby Academy learnings and coaching. The most significant gains qualitatively are in reading to and interacting with children in recognition of their ability to learn early on, as well as parents' self-regulating behavior to work through times of stress and frustration positively.

"Before [Baby Academy], [my attitude] was like "oh yeah, they're little kids, I don't have much worry - they gonna be learned" - but that's not true. I learned now, even when they are in my tummy, I have to sing, I have to talk, they learn. The more you tell them - they know. It's amazing, she's just 2 years old. The other kids I didn't teach them at 2 years old.

She knows now some letters, shapes, colors, it's an amazing change. It's good to learn these things as a first step.” – GLEA mom, 43, Ethiopia

“I have learned calming myself down when my child's upset. I learned how to manage my anger. I learned how to sit with my kids, how to give them more time. I learned what parts they need help with, every child is different. How to help them go through their emotional behaviors, dealing with the society, neighbors - so much more.

...Even though I have a 6 year old and 4 year old and 1 year old, I haven't had any experience with kids. Because, before having kids, I was not around kids. There was a lot of stuff I was doing wrong that Baby Academy helped me though. Or I knew, but I didn't know the tool to use. One example is crying, or when baby is fussing, how to calm them down when you're like upset, like how to, calm yourself down and to talk through to your child. I used to get frustrated in not knowing what to do, but now I know I have to step out, take a walk or you know, do some stuff that might relax me or make me go through my frustration or emotions so I can help them.” – GLEA mom, 35, Somalia

- Parents report positive outcomes related to these new behaviors and sharing new knowledge with peers inside and outside the Greenbridge community:

“Every week, whatever I learn here, we do at home....I know many friends who don't live in Greenbridge. I tell them whatever I learn, I just tell them, “Just try it with your children.” Discipline [for example], babies cry for a reason, babies learn even at a very young age, when they are just born babies want to learn. I tell them. Some parents say 'what kind of baby academy?'” [laughing, implying babies can't learn]. I tell them 'Babies can learn!' I tried it with my daughter. Even with the other kids I took another parenting class back then, but I learn even more at Baby Academy and I see the benefit.” – GLEA mom, 42, Somalia

- The pre- and post-survey is partially based on the University of Idaho Survey of Parenting Practices, a tool developed for evaluating a similar promising practice program Parents as Teachers. The tool surveys self-ratings in four domains, knowledge, confidence, skills, and behavior.
- The areas of largest growth for GLEA parents were in knowledge and confidence overall.
 - In Cohort 1, 82% who took the survey reported their knowledge of early learning has improved and 67% reported improved confidence in their abilities to parent and teach their children.
 - Cohort 2 showed large gains in knowledge of child development, and a notable increase in the Behavior domains, especially reading to their children.

Exhibit 11 Average Cohort 1 & 2 change in surveyed parenting knowledge, confidence, skills and behavior (Cohort 1 n=9, Cohort 2 n=19)

1. How would you rate yourself on the following parenting knowledge and practices? (Scale of 0-6) Average change shown for sample with both a pre and post
(Cohort 1 n=9; Cohort 2 n=19)

		Cohort 1	Cohort 2
KNOWLEDGE	a. My knowledge of how my child is growing and developing	15%	31%
	b. My knowledge of what behavior is typical at this age	16%	16%
	c. My knowledge of how my child's brain is growing and developing	31%	35%
CONFIDENCE	d. My confidence in myself as a parent	11%	1%
	e. My confidence in setting limits for my child	15%	5%
	f. My confidence that I can help my child learn at this age	9%	9%
SKILLS	g. My ability to identify what my child needs	2%	7%
	h. My ability to respond effectively when my child is upset	5%	3%
	i. My ability to keep my child safe and healthy	0%	1%
BEHAVIOR	j. The amount of activities my child and I do together	0%	11%
	k. The amount I read to my child	10%	30%
	l. My connection with other families and children	2%	15%

- Another intentional aspect of the GLEA approach is to increase familiarity with the education system, both to be able to advocate for their children in the K-12 system, and for the parents themselves to value their own education.
 - With the design of the Baby Academy in alignment with Highline Community College EDUC 293, an independent study course in the early learning program, attending adults are eligible to receive three college credits. Thirteen parents received 3 college credits for completion of Baby Academy in Cohort 1 and another 17 in Cohort 2.
 - Two GLEA moms from Cohort 1 are attending Highline Community College for additional classes in Early Childhood. Other graduate parents are now taking ELL classes.

Participation in Formal Early Childhood Education

- As of March 2016, four Cohort 1 babies have been participating in Play & Learn at the White Center Library. The Kaleidoscope Play & Learn model is a facilitated play group that focuses on activities to support child development and health. It is a Promising Practice as designated by the Evidence Based Practice Institute of the University of Washington.
- There are several Head Start programs available in the White Center Heights Elementary school area. Two classrooms operate out of the elementary school, and the Highline Learning Center Head

Start is operated by the Puget Sound Educational Service District at (The Village) at Greenbridge. Post-Baby Academy, of the 9 Cohort 1 babies aged 3 or turning 3 by eligibility time:

- 6 GLEA babies are attending Head Start,
- One has applied and is waiting,
- One has been determined not eligible until next year, and
- One has not applied.
- Families have expressed interest in, but difficulty accessing, formal early childhood education at Educare. Income qualification guidelines have prevented them from accessing subsidies to be able to attend this high-quality program, in families whose income exceeds the subsidy threshold, but does not afford them the option to fully private pay.
- School staff are interested in expanding local formal early education options to include an ECEAP site as well.
- Staff report a new level of interest and engagement around formal early education opportunities:
"In this [recent] discussion on preschool...these moms were stopping to talk about things like, 'What is a cooperative pre-school?' 'Give me your phone number, I can give you the info'. They became a group and a community." – GLEA Grant Team member

4.0 LEARNING AND TAKEAWAYS





























- We have early evidence that GLEA has succeeded modifying parent behaviors and knowledge and accessing early intervention for WCHE students before kindergarten. So far, five children aged 3 and younger, have been identified with developmental delays and connected to early intervention services, increasing their chances of reaching kindergarten ready. Long term impacts of these successes in kindergarten readiness and school success are to be determined.
- The unique partnership between KCHA and WCHE has been key to the program's success. There are several components to this relationship.
 - There was clear mission alignment, that allowed the partnership to be flexible and dynamic while focused on the same goals. This mission alignment included the intention that the program would be school-centered.
 - KCHA brought grant management capacity and a willingness to innovate (use incentives, for example)
 - Each partner brought access to families in different ways. KCHA as a housing provider had data and lists of families before age 5. The school had the ability to develop a personal non-threatening relationship with families as an educator.
 - Both partners were backed up by supportive leadership.
- GLEA is a resource intensive intervention, both in terms of the dollar spend and time involved. The return on investment is yet to be realized in long-term school success, but according to national studies on school readiness, would include savings from special education and other social services, as well as increases in personal income and tax revenue.
 - Having a certificated teacher as the family advocate has been identified as both a major portion of the costs, but a crucial part of the program's success. The advocate needs to be able to build trust with parents and children, as well be trained to recognize markers of child development and refer to or design appropriate activities and interventions.

- Engaging fathers is a consistent challenge across cohorts. Mothers report limited influence at home and wishing their partners could come to benefit from the same learning. Timing relative to employment and low interest are cited as reasons for low fathers' participation.
- Another challenge is maintaining the sustainability of the impact. Early anecdotes suggest that parents see the Baby Academy as a one-time intervention rather than the beginning of a structural shift that they can sustain. The team is looking at messaging and employing graduate parents in the program implementation as potential ways to continue their engagement and learning.
- Relationships among the families were a less anticipated positive outcome from the program. The Baby Academy coalesced around a core group of participating families, with mixed incomes and backgrounds. The level of family engagement is partially attributed to the new social network created.

5.0 LOOKING AHEAD (2016-2018 PLANS)

With the success of the initial GLEA cohorts, the program team began planning for expansion to Mount View Elementary School. Less than a mile away, Mount View is in the same school district (Highline School District) as White Center Heights Elementary, and also serves a majority non-white population with high rates of low-income students, including those from KCHA housing. The schools do, however, present certain differences. The program team took the expansion opportunity not only as a chance to serve more students, but to vary key components of the model to understand the drivers of the program's effectiveness. Side-by-side profiles of the schools are provided here.

Exhibit 12 White Center Heights and Mount View Elementary School Profiles

	White Center Heights Elementary	Mount View Elementary
	11427 3rd Ave S Seattle, 98168	10811 12th Ave SW Seattle, 98146
Enrollment		
October Student Count	617	658
Gender		
Male		51%  52%
Female		49%  49%
Race/Ethnicity		
American Indian or Alaskan Native		1%  1%
Asian		26%  15%
Native Hawaiian / Other Pacific Islander		3%  3%
Black		22%  8%
Hispanic		31%  62%
White		12%  9%
Two or More Races		4%  3%
Special Programs		
Low Income		79%  75%
Special Education		19%  14%
Limited English		48%  48%
Other Information		
Unexcused Absence Rate		2.0% 1.2%
Assessments		
3rd Grade ELA		18%  38%
3rd Grade Math		29%  44%
Teacher		
Student/Teacher Ratio (October Student Count)		16 15
Teacher Experience (Average Years)		8 10
Teacher Education (at least a master's degree)		74% 58%

Source: OSPI, 2014-15



600 Andover Park W. Seattle, WA 98188 | (206) 574-1100 | kcha.org