

PROGRESS REPORT: BHA FIVE-YEAR PLAN (FY 2020 – 2024)

The Boston Housing Authority created its 5 year plan covering the years 2020-2024 as part of the 2020 Annual Plan. Each year with the submission of the annual plan, the BHA will provide an update in the Progress Report. The goals and key initiatives from 2020 are listed below in the left hand column and those will remain the same for the five-year period. The updates and progress made on achieving those goals and key initiatives are described below in the right hand column and will be updated each year.

Background:

Boston Housing Authority owns and manages more than 10,000 units of public housing and administers housing subsidies for an additional 14,500 families in Boston and eastern Massachusetts through its Leased Housing programs. It is BHA's purpose to provide quality homes and strong communities for low-income Bostonians. BHA housing is truly affordable to Boston's most vulnerable families and individuals, and the Authority strives to ensure that its housing resources serve as a platform for opportunity for residents and a resource to the broader community.

BHA is a critical Boston institution that is an integral part of the vast majority of neighborhoods across the city. Employing nearly 800 workers, most of whom live in the city, BHA contributes significantly to the local economy. Each year we invest nearly \$140 million across the neighborhoods of Boston in the operation of our public housing communities, and we also invest \$270 million in private housing throughout the City through our Leased Housing program. We have generated an additional \$1.5 billion of investment in our neighborhoods through public-private partnerships like the redevelopments currently underway at Whittier, Orient Heights, and Charlestown.

One of the priorities laid out in BHA's previous five-year plan, 2015-2019, was to develop a framework to ensure the long-term viability of BHA's public housing communities in the face of persistent federal funding shortfalls. One important strategy has been public-private partnerships between BHA and other providers of affordable housing and supportive services. In November 2014, BHA issued an invitation to the affordable housing community in the form of a Request for Qualifications, asking organizations to propose innovative approaches to preserving BHA's housing for future generations with decreased reliance on federal public housing subsidies. The response was wide-ranging. BHA received ideas focused on over thirty separate public housing communities. In the years since, BHA has been taking up the most promising proposals one at a time, issuing a series of Requests for Proposals that have led to several new public-private partnerships. In the process, BHA has articulated a set of firm principals to guide its partnerships: Engage residents and community members in meaningful participatory planning; ensure tenant protections; fully preserve on a one-for-one basis all deeply subsidized housing units; and focus on sustaining BHA's assets to fulfill its mission to serve future generations.

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An equally critical strategy in addition to public-private partnerships is to provide for those BHA communities that will remain under BHA ownership—which is the majority of BHA’s housing (about 7000 units). Amassing the resources to upgrade and maintain BHA’s public housing portfolio remains a challenge given the nearly \$1 billion in capital backlog. BHA will continue to invest in the long term preservation of these communities using a variety of tools, including HUD’s Rental Assistance Demonstration program, project-based Section 8, comprehensive capital planning, and better use of technology to deliver our housing services. These BHA sites will continue to be a critical part of their surrounding neighborhoods and the community fabric of the City of Boston.

While we endeavor to preserve our public housing assets, BHA’s Leased Housing program has steadily grown to cover more than 14,500 homes, providing a critical tool for affordable housing preservation and development throughout Boston. BHA is continually implementing strategies to ensure that the Leased Housing program is effectively serving low-income families and individuals. As part of BHA’s commitment to affirmatively further fair housing, in July 2019, BHA implemented Small Area Fair Market Rents (SAFMRs) as exception payment standards in those zip codes where they are necessary to make communities accessible and affordable for voucher holders. The goal of implementing SAFMR exception payment standards is multifold: expand choice for voucher holders and decrease the concentration of vouchers in high poverty areas; preserve people’s ability to remain where they live, preventing displacement and harmful gentrification; and minimize the risk of artificially inflating rents throughout the city.

Over the coming five years, as we continue to invest in public housing preservation and expand the reach of the Leased Housing program, BHA will adjust our business processes and expand our internal capacities. For this 2020-2024 Plan we identify six broad strategic priorities:

1. Achieve and maintain high performer status for the public and leased housing programs.
2. Strengthen and preserve the BHA portfolio of public housing.
3. Increase housing opportunities through the leased housing program.
4. Support resident capacity-building, self-sufficiency and quality of life initiatives that help residents meet their personal goals for themselves and their families.
5. Identify and plan for future staffing needs at BHA.
6. Continue to improve customer service in all areas so that the BHA is consistently experienced by residents, applicants, landlords and vendors as an efficient, pleasant and responsive organization.

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Within this context, the Authority proposes the following initiatives:

Goals	Updates and Progress Made
<p>1. Strategic Focus: Achieve and maintain high performer status as evaluated by HUD in their Public Housing Assessment System (PHAS) for the public and leased housing programs:</p>	
<p>Maintain 97% or higher Occupancy Levels:</p>	<p>BHA operations is working towards 97% occupancy as the minimum standard with the ultimate goal of all sites reaching 98% and above. Currently in the midst redevelopment of the Charlestown, JJ Carroll, and Lenox and current resources are being utilized for the relocation efforts in those projects. Operations to continue to work on expediting unit turnover with the expectation that all vacant units be ready for move in 30 days or less, and new applicants housed in under 60 days. Work closely with the Admissions department to insure there is a sufficient pool of applicants to fill vacancies and improve tracking capabilities of expected future vacancies' to properly notify the Admissions Department of upcoming case need.</p> <p>Stress the importance of Quality Control initiated inspections to be carried out by Operations Senior staff on vacant unit turnover.</p>
<p>Maintain 100% Utilization of Section 8 Resources:</p>	<p>The BHA continues leasing efforts in 2020 to expend all available budget authority and reach baseline number of vouchers. Due to supplemental funding received through the CARES Act the BHA will end the year with approximately a 10% reserve. The BHA anticipates expending all available funding in 2021 and utilizing approximately 98% of the unit months available under the HUD baseline number of vouchers restriction.</p>
<p>Continually improve toward achievement of high-performer PHAS status.</p>	<p>Continue to focus on all key indicators including rent collection, recertifications, and vacancy reduction along with improved REAC scores. Staff training and implementing and setting clear productivity expectations on each indicator.</p>
<p>2. Strategic Focus: Strengthen and preserve the BHA portfolio of public housing:</p>	

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<p>Formalize asset management staffing and systems within BHA’s organizational structure.</p>	<p>BHA senior management have convened biweekly meetings to advance this goal. Much of the focus to date has been BHA’s increasing portfolio of Section 8 housing units and other affordable housing outside of the traditional public housing program. For example, staff are devising tools such as new budgeting templates that will be flexible enough to accommodate various subsidy platforms, while also delivering robust budget-to-actuals reporting to guide operational decisions.</p>
<p>In all redevelopment transactions, provide for BHA’s financial stability in order to preserve public housing character and associated tenant protections into the future.</p>	<p>While traditional public housing provides valuable, explicitly articulated protections for public housing tenants, the programs have been underfunded over the years. As BHA implements alternatives to traditional public housing—such as, for example, Project Based Voucher Section 8 subsidies that provide a more robust and reliable financing stream—we must also take care to put in place the same sorts of protections that public housing residents enjoy. This year BHA joined two advocacy agencies, Greater Boston Lease Services and City Life/Vida Urbana to secure a grant through the Innovative Stable Housing Initiative Upstream Fund (the “ISHI Grant”) that is supporting work among the organizations and in collaboration with public housing local tenants organizations at sites that are going through (or have recently gone through) subsidy conversions and, in some cases, ownership transitions. The goal of the ISHI work is to compile a toolkit of resources to inform such conversions. That includes explanatory materials to inform residents and managers about how conversions may affect basic operational processes such as rent calculations. It also includes model documents such as leases and House Rules that will ensure continuation of valuable public housing protections even under alternative subsidy platforms. The ISHI work will be completed by spring 2021.</p>
<p>Complete a portfolio-wide capital needs assessment for all properties not currently slated for redevelopment. Devise a strategic plan to fund these capital needs over the long term.</p>	<p>Capital Needs Assessments (CNAs) have begun for 35% of BHA properties with the remaining 65% of the properties to be completed by December 2021. These CNAs will assist in planning for immediate and future capital projects.</p>
<p>Add new deeply affordable units where possible during</p>	<p>In recent years BHA public housing redevelopment activity has</p>

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<p>redevelopment.</p>	<p>successfully adhered to the principle of one-for-one replacement, meaning that all original public housing units have been replaced (or preserved) with comparable, equally deeply affordable housing units—either RAD or Section 8 Project Based Voucher (PBV) units.</p> <p>BHA is also creating net-new deeply affordable housing, meaning additional deeply affordable housing units above the number needed to replace original public housing:</p> <ul style="list-style-type: none"> • O’Connor Way, a new affordable elderly housing community finishing construction in fall 2020 on vacant land at the periphery of BHA’s Mary Ellen McCormack, includes 22 new PBV Section 8 units (deeply affordable) plus 25 additional affordable units for a total of 47 net-new affordable units. • 125 Amory, a BHA elderly/disabled property undergoing renovations to be complete in early 2021, will offer 12 new Section 8 PBV units (in addition to the 199 original public housing units that have converted to Section 8). • The redevelopment of JJ Carroll scheduled to begin in early 2021 will include 77 net-new PBV Section 8 units (in addition to 64 PBV Section 8 units to replace the original public housing units). • Old Colony Phase 3 includes 55 additional deeply affordable units as Phase 3C. (In total phase 3 entailed demolition of 250 original public housing units and construction of 305 new Section 8 units.) • The redevelopment of BHA’s Clippership Apartments now underway will result in a total of 22 PBV Section 8 units, which is 2 more than the original 20 units that were demolished (as well as, in addition, 30 new for-sale homeownership condominium units, 16 of which will be affordable). • Holtzer Park, a brand new building that recently began construction on vacant land at BHA’s Amory Street site, will be 100% affordable: 62 new affordable, of which 8 will be deeply affordable PBV Section 8 units.
<p>In furtherance of BHA’s commitment to sustainability, continue to reduce carbon emission toward 38% of</p>	<ol style="list-style-type: none"> 1. Reduced carbon emissions at numerous developments, including: <ol style="list-style-type: none"> a. Codman – Heating and Hot Water Boiler Retrofit

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<p>2008 level; and continue to explore climate resiliency, moving from identifying vulnerabilities toward implementing solutions.</p>	<ul style="list-style-type: none"> b. Frederick Douglass – Air Sealing c. Hampton House – Air Sealing d. Washington Manor – Air Sealing e. Monsignor Powers – Window and Patio Door Replacements f. JJ Malone – High Efficiency Hot Water Distribution Pilot <p>2. Explore Climate Resiliency:</p> <ul style="list-style-type: none"> a. Working with MA Department of Housing and Community Development (DHCD) on the Climate Hazard Adaption and Resilience Masterplan (CHARM) to better understand and assess risk and vulnerability as well as solutions through informed capital planning and project design b. Participated in the Urban Land Institute’s charrette “Living with Heat”, and monitoring their comprehensive research project examining the effects and solutions to increased heat on the Greater Boston Area
<p style="text-align: center;">3. Strategic Focus Area: Increase Housing Opportunities through the Leased Housing program:</p>	
<p>Apply for additional vouchers as opportunities arise.</p>	<p>The BHA applied for Mainstream Housing Vouchers, vouchers allocated for families with disabled non-elderly adult household members, and received an award for 238 vouchers. These vouchers supplement the 500 vouchers BHA maintains for Non-Elderly Disabled (NED) households, bringing the total number of vouchers for non-elderly disabled families to 738, notwithstanding the units designated for non-elderly disabled families in the project based voucher portfolio. BHA has a pending application with HUD for an additional 100 Mainstream vouchers.</p> <p>The BHA also received additional funding for 26 additional VASH vouchers in May of 2020, bringing the BHA’s total VASH allocation to 631. The BHA also has a pending application for additional VASH vouchers which will be awarded based on HUD’s determination of local need.</p> <p>The BHA has also continued to increase utilization for the Family</p>

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	<p>Unification Program (FUP) to increase changes of eligibility for any additional funding opportunities. Utilization was increased in 2019 from 55% up to 81% with additional FUP families shopping with open vouchers.</p>
<p>Maintain high occupancy rates in the Project-Based Voucher (PBV) portfolio while decreasing turnover times.</p>	<p>The BHA closely monitors vacancy rates in the project based voucher program to maximize housing opportunities for Boston families. In order to further increase occupancy rates and a focus on reducing unit turnover, BHA is in the process of implementing an online Owner Portal that will enable the tracking of eligible applicant referrals from the BHA waiting lists to the respective owner for suitability screening.</p>
<p>Optimize the use of PBVs to preserve and create affordable housing in Boston.</p>	<p>The BHA has awarded project based vouchers to preserve tenancies at three expiring use developments that were previously subsidized by the state 13a mortgage program. The three buildings are Forbes, Newcastle-Saranac, and Mercantile wharf. Approximately 100 project based vouchers were awarded.</p> <p>Additionally, the BHA awarded 106 vouchers to a project in Jamaica Plan that will include a mix of Project Based Vouchers and Mainstream Vouchers and another 15 vouchers a project at Quint Ave that will provide support individuals in recovery. The BHA will continue to solicit Project Based Vouchers, specifically soliciting opportunities to project base Mainstream vouchers.</p>
<p>Implement ECHO—Expanding Choice in Housing Opportunities pilot program—and Small Area Fair Market Rents to promote access for voucher holders to a wider array of neighborhoods.</p>	<p>The BHA launched Expanding Choice in Housing Opportunities (ECHO) pilot program. ECHO is a voluntary program aimed at affirmatively furthering fair housing by providing technical assistance and information to BHA voucher-holders. Under the Fair Housing Act our voucher-holders should be able to live in any part of Massachusetts they choose and the mission of the ECHO program is to provide them with all the information and technical assistance they will need to make their own decisions. Through ECHO, BHA has taken steps insure that our voucher-holders receive Fair Housing training, so they will know their rights and protections under the Fair Housing Act, and what steps to take if they encounter any discriminatory behavior.</p>

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	<p>The BHA has also developed a software tool that assists families with identifying neighborhoods that might meet their family needs, providing information on neighborhood qualities including schools, transportation, and public safety and linking them to units that can be afforded under BHA’s payment standard structure.</p> <p>The initial pilot consists of 122 existing families who have been briefed on the objectives of the ECHO program. Most have received individual counseling and many have made moves with the assistance of the ECHO Coordinator.</p> <p>The BHA has also implemented Small Area Fair Market Rents as exception payment standards in many of the zip codes that fall within its administrative area, to increase options for voucher holders to find apartments in a wider variety of apartments.</p> <p>The BHA has also hired a Director of Housing Search and Landlord Recruitment with the goal of continuing to expand on housing choices for voucher families by recruiting new landlords to the program, improving on existing program marketing materials, streamlining administrative barriers, and proving resources for housing search through internal tools and access to external partnerships.</p>
<p>4. Strategic Focus: Strengthen resident capacity-building and quality of life initiatives that help residents meet their own personal goals and that help support vibrant communities:</p>	
<p>Rebuild resident capacity program to support resident empowerment and leadership; improve the efficacy and efficiency of Local Tenant Organizations (LTOs), Resident Empowerment Coalition (REC), and Section 8 Tenants Incorporated (S8TI).</p> <ul style="list-style-type: none"> o Develop metrics to track levels of resident 	<p>The Resident Capacity Program provides regular board compliance and Tenant Participation Fund training to new and existing Family & Elderly/Disabled Board members in collaboration with Mel King Institute and Boston Resident Training Institute.</p> <p>Current metrics track LTO Compliance; TPF spending; participation in</p>

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<p>organization and engagement.</p> <ul style="list-style-type: none"> o Revise LTO policy, election procedures, and by-laws; pursue strategies to maximize diversity of participants and their level of participation in LTOs. 	<p>REC Meetings; LTO meetings and activities.</p> <p>Holding monthly Resident Empowerment Coalition meetings, now on a virtual basis. Registration for meetings captures first time participants. Meetings were formerly held on a bimonthly schedule.</p> <p>From the REC Meetings, we have developed a Peer Learning Committee and Election Support Committee. The topics for both committees are developed with resident input and resident leaders co-host with RCP staff.</p> <p>Tenant Participation Fund reports and Laundry fund reports are tracked quarterly, with regular follow ups and technical assistance provided to LTOs.</p> <p>Resident Capacity Program staff currently includes 2 Coordinators; 3 Full-Time interns; 4 Part-Time Interns. The additional staffing capacity allows us to better connect and work with Public Housing, Mixed Finance, and Section 8 residents.</p> <p>Through our Resident Ambassador program, BHA residents helped to improve 2020 Census response rates in hard to count areas by getting their neighbors to complete the census and addressing their concerns. Resident Ambassadors were trained through Tech Goes Home on how to properly engage their neighbors and talk about the Census.</p> <p>The CCECR section of the BHA website now features an LTO Resource Page - for LTO members and general residents. The information includes links to templates needed for their TPF reporting. LTO Members and general residents can also find links to LTO bylaws and Board contact information.</p>
<p>Institutionalize resident protections and participation in all redevelopment projects; advance internal BHA</p>	<p>BHA collaborated with Greater Boston Legal Services and City Life/Vida Urbana on a grant offered by three hospitals known as Innovative Stable</p>

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systems to ensure long-term compliance by new owners.	Housing Initiative that was successful. The partners call it the Tenant Empowerment Project (TEP) and its focus is to develop tools and trainings and empower residents as they go through redevelopment.
Explore voter registration at re-certification.	No update for 2020. Staff will move forward with planning around this goal in 2021.
Increase Family Self-Sufficiency (FSS) Participation from 200 to 800 households.	BHA has increased FSS Participation to 270 and continues to enroll families. We are expected to enroll 800 families by the end of calendar year 2021.
5. Strategic Focus: Identify and plan for future staffing needs and to support BHA staff:	
Proactively plan for future staffing in light of property repositioning and pending retirements; identify areas where BHA needs to hire for new capacities and functions.	Working with Human Resources and Finance to identify retirees and devise replacement needs in Operations. Identify career development opportunities for staff that could be promoted into new classifications for advancement.
Institute additional mentoring and training for the current and the next generation of BHA staff.	No update for 2020. Staff will move forward with planning around this goal in 2021.
Continue to promote diverse hiring and employment opportunities for BHA residents.	BHA has been able to provide additional stipends for residents interested in capacity building and engagement work (ie; Census, digital equity) as well as for COVID response related work (ie; food distribution).
Continue to develop information systems, communications tools, and interactive forums to enhance collaboration, efficiency and productivity across departments.	BHA is preparing to issue a Request For Proposals to implement automated texting, robocalling and emailing capabilities for better and more timely communication with residents and voucher holders.
6. Strategic Focus: Identify and plan for future staffing needs and to support BHA staff:	
Develop a Customer Service Policy to promote client-focused and consistent service delivery.	Additional skills development to be reviewed by Director of Operations and Director of Compliance in order to develop programming that will assist with the operations field staff to continue to better serve the clients and general public.
Optimize technology to transform interaction with the agency—e.g., landlord and tenant portals, vendor tools,	BHA implemented on-line rental payment and automated demand debit rental payments for residents who opt in. Public Housing files are in the

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<p>on-line rental payment and direct deposit.</p>	<p>process of being digitally transferred. All resident records will be stored digitally allowing greater capacity to serve our residents both in person and virtually.</p> <p>BHA has implemented Virtual appointments with clients in order expedite processing, recertification's, rent changes and other business that was strictly handled in person previously.</p> <p>Staff training on handheld tablets with introduction of work system (Elite).</p> <p>Resident portals are currently planned and will allow clients to update financial information in rent determination, and to initiate new work orders.</p>
<p>Streamline and simplify the housing application process to maximize transparency for applicants and focus staff efforts on working with applicants who are most likely to be housed in the near future.</p>	<p>BHA has drafted policy revisions that align the application and verification policies across federally assisted programs, to simplify requirements for any applicant that applies to multiple BHA programs. The policy revisions also reduce the verification requirements for applicants as related to housing history, which can often be extremely difficult to piece together for homeless or otherwise unstably housed applicants and of little value for determining eligibility and suitability.</p> <p>The BHA has also begun planning to simplify its online application process. The BHA plans to have a web-based portal for all federal housing programs by early 2021 and intends to use the state mandated online system for all state funded housing programs at the same time. As these portals are brought online the BHA will move away from paper-based applications, unless necessary as a reasonable accommodation or other special circumstances.</p> <p>Update BHA website with virtual units that can be viewed 360 degree viewing to speed application decision making process. Based on what we have learned with Pandemic our Technology is limited and in need up updating; this virtual aspect will assist with more rapid unit selection.</p>
<p>Simplify applicant and resident forms; improve program marketing materials and briefings.</p>	<p>The BHA has revised of the Admissions and Continued Occupancy policy aimed at transparency. The BHA will continue working on policy</p>

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	<p>documents in the coming years to be as succinct and precise as possible.</p> <p>The BHA has created an online briefing session and worked to simplify many of the forms associated with voucher issuance, including the RFTA and the BHA Leasing Guidebook.</p> <p>The BHA will also work to simplify the Application form, which will ultimately mirror the online portals described above.</p> <p>In 2021 the BHA will work to compose several videos that can be used for marketing or informational purposes.</p>
<p>Improve landlord recruitment and retention strategies.</p>	<p>The BHA hired a Director of Housing Search and Landlord Recruitment to focus on this issue. The Director will focus on marketing to existing and new landlords, including designing informational sessions for interested landlords.</p> <p>The BHA is also implementing an online owner portal that will allow BHA owners access to financial information, inspection results and scheduling information, and the ability to follow move ins and rent increases through statuses as they move from submission to completion.</p> <p>As related to inspections, the BHA is moving to biennial inspections and will begin accepting self-certification of repairs for non-life threatening violations of HQS.</p>
<p>Provide additional opportunities for customer feedback.</p>	<p>The BHA implemented a texting survey for voucher holders which has provided significant feedback regarding the housing search and move process. The BHA will look to develop other surveys for owners, applicants, and tenants, to drive procedural changes and improve customer service. New platforms will be created where clients can receive surveys in all media form, TEXT, EMAIL, PHONE, and reply confidentially.</p>