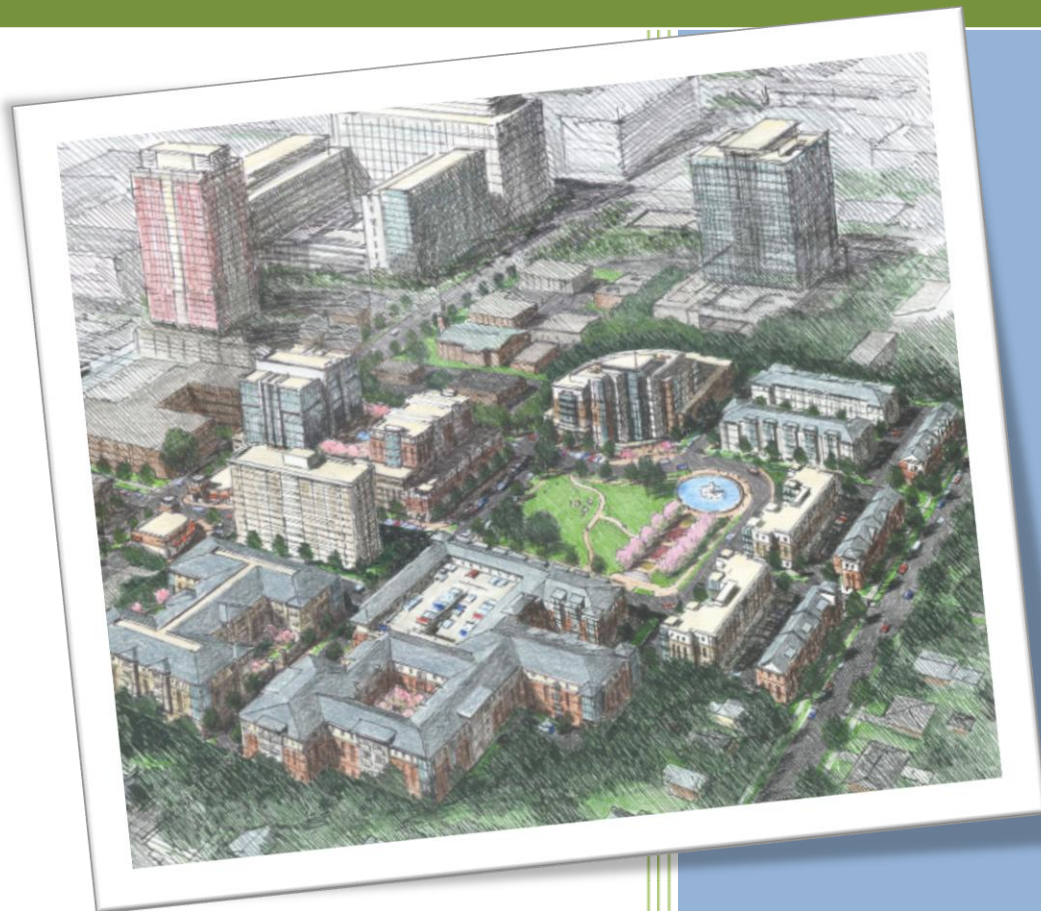


This document is an abridged version of the Draft FY 2011-2012 Moving Forward Annual Plan. The purpose of this summary is to highlight the major points from the full Plan. The full Plan is available on the agency website at www.cha-nc.org.

FY 2011 – 2012 Moving Forward Annual Plan Summary



Charlotte Housing Authority

1301 South Blvd.

Charlotte, NC 28203

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www.cha-nc.org

Revised April 7, 2011



Charlotte Housing Authority

Housing Authority of the City of Charlotte, NC

The mission of the Charlotte Housing Authority is to lead, develop and execute community-wide strategies that meet the broad range of housing needs for families who cannot otherwise attain conventional housing.

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I. Introduction

The Charlotte Housing Authority became a participating agency in the US Department of Housing and Urban Development's Moving To Work (MTW) federal demonstration program in Fiscal Year 2008. MTW is a demonstration program that offers agencies the opportunity to design and test innovative, locally-designed housing and self-sufficiency strategies for low-income families by allowing exemptions from existing public housing and tenant-based Housing Choice Voucher rules. The program also permits these agencies to combine operating, capital, and tenant-based assistance funds into a single agency-wide funding source, as approved by HUD.

The purpose of the MTW program is to give participating agencies and HUD the flexibility to design and test various approaches for providing and administering housing assistance that accomplish three primary goals:

- Reduce cost and achieve greater costs effectiveness in Federal expenditures;
- Give incentives to families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient; and
- Increase housing choices for low-income families.

The outcome measures of CHA's initiatives are reported in the chart below as they correspond to HUD's three federal statutory objectives. HUD will use the outcome measures of participating housing authorities to make decisions about ways to better address local community needs.

Results of Activities Using MTW Flexibility				
	Reduced Costs	Achieved Administrative Efficiencies	Promoted Self-Sufficiency	Increased Housing Choice
FY08				
FY09	\$97,661.80 cost savings	\$66,312.82 additional interest earned using the State investments over HUD investments	36 FSS working families	110 units acquired
FY10	\$95,750.55 cost savings	\$11,000 additional interest earned using the State investments over HUD investments	48 FSS working families	566 units acquired; 21 CBRA units completed
Cumulative¹	\$193,412.35²	\$77,312.82	84	697

¹ The above results do not reflect the total of all initiatives CHA has implemented since 2008. Many of the initiatives achieved the HUD statutory objective but did not show tangible results. For example, a 5% decrease in Part I crimes in the communities may not have created additional units, but it expanded housing choices by opening up opportunities for consideration by waitlist participants that may have opted out of a site because of perception of crime. In FY2008 CHA's initiatives were concentrated on the Housing Choice Voucher Program and related to de-concentration, training and inspections.

The following activities include agency highlights that do not require MTW flexibility to implement, however, because the Charlotte Housing Authority is a block grant agency, MTW funds will be used in the activity. These activities are considered significant due to the impact on our residents and customers. Many of the activities will support ongoing MTW initiatives such as the self-sufficiency programs.

Redevelopment Activities

Charlottetown Terrace

The Charlotte Housing Authority will redevelop the current 180 unit Charlottetown Terrace into 161 affordable units. This 100% affordable community will serve disabled residents at or below 30% of the area median income and will consist of:

- 125 studio/efficiency units
- 36 one-bedroom units.

CHA will invest over \$12 million in partnership with a HUD Capital Fund Recovery Competition (CFRC) grant and the City of Charlotte's Housing Trust Fund (HTF). The renovation will include a new "service-enriched" environment to accommodate the needs of the residents. Proposed project amenities will include: on-site medical/social service offices, community room, commercial kitchen, exercise room, library, movie theater, lounge and other indoor/outdoor amenities.

CHA is committed to "green" and "sustainable" practices. In support of this commitment, Charlottetown Terrace is pursuing the United States Green Building Council (USGBC) LEED – Silver Certification. This will be CHA's first Leadership in Energy and Environmental Design (LEED) community.

Strawn Tower

The agency will also redevelop the 195 unit Strawn Tower into a 170 unit community for elderly residents. The 100% affordable community will serve elderly residents at or below 60% of the area median income and will consist of:

- 129 studio/efficiency units
- 41 one-bedroom units

CHA will invest over \$16M in partnership with the North Carolina Housing Finance Agency (NCHFA), the City of Charlotte's Housing Trust Fund (HTF) and HUD's Capital Fund Financing Program (CFFP). Construction is expected to start in January 2012. This renovation will include a new "service-enriched" environment to accommodate the needs of the residents. Proposed project amenities will include: on-site medical/social service offices, community room, commercial kitchen, exercise room, library, movie theater, lounge and other indoor/outdoor amenities.

² Initiatives contributing to reduced costs: acquisitions versus new construction; direct deposit of the Housing Assistance Payment; and using the Certificate of Occupancy in lieu of the Housing Quality Standard Inspection.

Parktowne Terrace

The agency is also planning to use funding from HUD's Capital Fund Financing Program (CFFP) to do a complete rehabilitation of Parktowne Terrace, a 163-unit tower for seniors. The project has also received a \$250,000 grant from the City of Charlotte's EECBG stimulus funding and a loan from CHA's MTW funding to complete this redevelopment.

All 163 units will remain Section 9 units. The renovated community will include a new "service-enriched" environment to accommodate the needs of the residents. Proposed project amenities will include on-site medical/social service offices, community gathering room with warming kitchen, exercise room, library, lounge and other indoor/outdoor amenities. Construction is expected to start January 2012.

Boulevard Homes

The Charlotte Housing Authority has been awarded \$20.9 million HOPE VI grant for the redevelopment of its Boulevard Homes property. The envisioned redevelopment represents a unique partnership among CHA, Charlotte Mecklenburg Schools (CMS), the City of Charlotte, Mecklenburg County Park and Recreation and several service providers to create an education-centered mixed-income community.

This HOPE VI program includes the construction and rehabilitation of a total of 902 units of housing on and off site. The on-site revitalization program will create an education-centered community with 332 new residential units, including 317 affordable rental units.

We anticipate completion of the demolition of the current 300 Boulevard units, construction of the infrastructure and start construction on the first on-site residential component (a 110-unit building for seniors) in FY11.

With Every Heartbeat There Is Life

During fiscal year 2011 – 2012 CHA will continue to participate in the NIH project, With Every Heartbeat Is Life. A total of 70 participants have graduated since March 2010. A small portion are Boulevard residents and FSS participants from Victoria Square, Claremont and First Ward. CHA is evaluating the best method to analyze the data that is being captured during each session and will use the data from March, 2010 – March, 2011 to develop baselines and benchmarks for the upcoming fiscal year. The most recent graduating class was successful with approximately 7- 8 people experiencing weight loss during their 11-week class which they contributed to the education received from the program on how to eat healthier and incorporating more physical activity.

Employment Center

In an effort to expand the services being provided to residents to help them meet the work requirement, CHA is partnering with Jacob's Ladder, City Dive, and the Workforce Development Board to open the Center for Employment Services (CES) on Charlotte's West Boulevard Corridor. The Center for Employment Services is located in the Arbor

Glen (a HOPE VI Community) apartment community, near the intersection of Clanton Road and West Boulevard and is on a bus line.

Motivational Training

The agency will provide training course work titled Getting Ahead in a Just-Gettin' By World to residents participating in case management. This will enable them to better understand their situation and to allow them to be accountable for making the changes needed to move residents towards self-sufficiency.

Transportation Assistance

In FY09, CHA was awarded a \$100,859.38 grant from the Charlotte Area Transit System, via their Job Access and Reverse Commute grant funding. To date, CHA has provided 23,709 bus passes (a combination of round trip rides, 10-rides and a few monthly passes) to individuals engaged in employment-related activities. Specifically, we have provided 10,702 bus passes to individuals engaged in job search activities, 6,074 bus passes to individuals enrolled in a job training program and 6,933 bus passes to individuals traveling to and from a job.

CHA has received a second JARC grant for \$30,000 over a 2 year period for a total of 5,976 bus passes so we can continue to provide transportation assistance for employment-related activities. CHA will provide a match of \$30,000 per year.

Housing Homeless

Data compiled from several sources by Urban Ministry Center indicates Charlotte spends an average of \$4,000 a day on homeless persons between jail, detoxification, mental health, emergency room visits and hospital stays. It is approximated that for \$29.40 a day, housing and supportive services can be provided to these same individuals. Our local efforts to increase the capacity of those with existing expertise have included:

Hampton Creste Apartments - In 2010, Horizon Development Properties, Inc., a subsidiary of the Charlotte Housing Authority, acquired the Hampton Creste apartment complex. CHA has set aside 60 of the units for families currently being served by the Salvation Army. The apartments were furnished through the assistance of St. Matthew Catholic Church, St. Gabriel Catholic Church, Habitat for Humanity of Greater Charlotte, Mecklenburg County, and Charlotte-Mecklenburg Schools. The Hampton Creste Transitional Housing Initiative is offering permanent, long-term solutions to homeless families by providing supportive services that include case management, vocational and educational training, and therapeutic services.

McCreesh Place - McCreesh Place II is owned by St. Peter's Homes, Inc. The development targets homeless men or men at risk of becoming homeless with disabilities who are at or below 40% of the area median income (AMI). St. Peter's Homes, Inc will provide affordable housing in a recovery-friendly environment with on-site case management supportive services. CHA will invest almost \$1M and also provide rental subsidies for 89 of the 91 units for McCreesh Place II. The City of

Charlotte Housing Trust Fund (HTF) will contribute over \$2.1M to the project. The funds will go towards the rehabilitation of the existing sixty-four (64) single occupancy units and the construction of an additional twenty-seven (27) efficiency units. Construction is expected to start in 2011.

Moore Place – CHA will be a lender and provider of rental subsidies in a development of 85 efficiency units for chronically homeless men and women at or below 30% AMI. The 100% affordable community will be owned and operated by Charlotte Housing First, LLC, a subsidiary of Urban Ministry Center (UMC), an interfaith organization dedicated to serving the homeless and ending homelessness. The City of Charlotte Housing Trust Fund (HTF) in partnership with several major foundations and other private funders will invest \$10M to complete the development. Construction is expected to begin in 2011.

Overview of the Agency's MTW goals and objectives for the year



The Fiscal Year 2011-2012 Moving Forward Annual Plan marks the 5th year as an MTW agency. The Charlotte Housing Authority's MTW Agreement with HUD will expire in 2018. The authority is required to develop an Annual Plan each year to provide local stakeholders and HUD with a clear understanding of the Agency's activities for the coming fiscal year.

The Charlotte Housing Authority's MTW Program, locally branded "Moving Forward", shares the Corporate goals and several related objectives listed in the Authority's Balanced Scorecard:

Goals:

- Provide the greatest number of viable and affordable housing solutions from homelessness to permanent housing through sustainable strategic partnerships.
- Maximize economic, physical, and social value of CHA real estate portfolio.
- Ensure the Authority's long-term financial viability.
- Provide high quality, cost effective real estate services that integrate client families into the community's mainstream.
- Create an environment that encourages client families to reach their highest potential.

Corporate Objectives:

- Increase affordable housing opportunities
- Lead strategic partnerships
- Provide optimal housing choices
- Maximize portfolio value
- Maximize funding sources
- Promote innovative solutions

- Enhance strategic technology infrastructure
- Optimize Performance of the Section 8 Program
- Maximize Customer Service
- Ensure long-term financial viability

II. General Housing Authority Operating Information

A. Housing Stock Information

This section addresses the Charlotte Housing Authority's housing stock information for FY 2012. Information regarding the number of public housing units, housing choice vouchers (Section 8 tenant-based assistance program), as well as the leasing information and waiting lists are provided per Attachment B of the Amended and Restated Moving To Work Agreement. It is important to note that in some instances, the information provided is anticipated or proposed and may be subject to change during the Plan year. Actual information is provided in the Annual Report at the conclusion of the fiscal year.

		APRIL 1, 2011	MARCH 31, 2012
Number of public housing units at the beginning of the year		3,167	3,227
General description of any planned significant capital expenditures by development (>30% of the Agency's total budgeted capital expenditures for the fiscal year)		In FY2012, Edwin Towers will receive \$1,666,000.00 in capital improvements for new HVAC systems, landscape improvements, replace damaged concrete sealant, replace patio handrails, and community center furnishings. This represents nearly 35% of the Agency's total budgeted capital expenditures for the fiscal year.	
Description of any new public housing units to be added during the year by development (specifying bedroom size, type, accessible features, if applicable)		149 units are anticipated to be added during the year.	
Development	Accessible Features	Type	Bedroom Size
Woodlawn House	Will be compliant after rehab	Senior	34 - 1 bedrooms 18 - 2 bedrooms
McCreech Place	ADA Compliant	Homeless	63 - 1 bedrooms
Moore Place	ADA Compliant	Supportive Housing for Homeless	34 - 0 Bedrooms
Number of public housing units to be removed from the inventory during the year by development specifying the justification for the removal		26 units will be removed from Strawn Tower as part of the rehabilitation project	
Number of MTW Housing Choice Vouchers units authorized		4,691	4,673(anticipate 100 additional FUP)
Number of non-MTW HCV units authorized		118 (85 Veteran Affairs Supported Housing-VASH, 33 Port Out)	118 (cannot project the number of Port Outs)

Number of HCV units to be project-based during the Plan year, including description of each separate project		CHA has 296 Project-based vouchers at present. An additional 237 are committed for FY12 for a total of 534.
Development	Number of Units	Type
940 Brevard	60	Seniors
McAden Park	30	Family
Seigle Point	18	Family
Mill Pond	51	Family
Prosperity Creek	84	Seniors
Spring Croft	18	Seniors
YWCA	10	Transitional
Cherry Gardens	11	Seniors
Ashley Square at Live Oak	14	Family
FY12		
McCreesh Place II	26	Homeless
Woodlawn	52	Seniors
Moore Place	51	Family
Steele Creek	60	Seniors
Lofts at Seigle Pointe	38	Family
Everette House	10	Family

CHANGES TO ACC UNIT NUMBERS IN FY 11 & FY 12		
ACC Units at the start of FY 11		3,342
Deletions:	# of Units	Unit Count
Charlottetown Terrace	19	3,323
Boulevard Homes	300	3,023
Additions:		
Hampton Creste	60	3,083
McMullen Wood	21	3,104
McCreesh Place	63	3,167
Total ACC in Use As of 3/31/11		3,167
ACC Units at the Start of FY 12		3,167
Deletions:		
Strawn High Rise	26	3,141
Additions:		
Woodlawn House	52	3,193
Moore Place	34	3,227
ACC Units at the End of FY 12 (March 31, 2012)		3,227

B. Leasing Information

Anticipated total number of MTW PH units leased in the Plan year	3197
Anticipated total number of non-MTW PH units	CHA does not have any non-MTW PH units

leased in the Plan year	
Anticipated total number of MTW HCV units leased in the Plan year	4,363 (210 vouchers will have to be held for PBV developments coming on line in FY12)
Anticipated total number of non-MTW HCV units leased in the Plan year	118
Description of anticipated issues relating to any potential difficulties in leasing units (HCV or PH)	There has been slow lease up with VASH and FUP because all applicants must be referred. There are no leasing problems with the public housing units.
Optional in Plan: Number of project-based vouchers in-use at the start of the Plan year	296

C. Waiting List Information

Description of anticipated changes in waiting lists (site-based, community-wide, HCV, merged).

There are no changes anticipated in the site-based waiting list for public housing.

Staff is working on a revised waiting list pre-application for the Housing Choice Voucher Program.

Description of anticipated changes in the number of families on the waiting list(s) and/or opening and closing of the waiting list(s).

Public Housing

There were 2,300 applicants on the public housing wait list as of December 29, 2010. The public housing waiting list purge was completed October 2009. The public housing wait lists are site-based and CHA is opening its public housing waitlists for two-bedroom and three bedroom apartments for the non-senior/disabled housing communities in November 2010.

Housing Choice Voucher

There were 2,177 applicants on the Housing Choice Voucher waitlist as of December 29, 2010. The Housing Choice Voucher waiting list will remain closed and an update purge will be conducted in January or February 2011 which may impact the “amount” of people on the list. The Charlotte Housing Authority applied for 200 vouchers for Non-Elderly Persons with Disabilities; however these were not awarded.

III. Non-MTW Related Housing Authority Information (Optional)

Certificate of Achievement

In June 2010 the Charlotte Housing Authority received a Certificate of Achievement for Excellence in Financial Reporting by the Government Finance Officers Association of the United States and Canada (GFOA) for its comprehensive annual financial report

(CAFR). This is the fifth consecutive year the agency has received this award. The Certificate of Achievement is the highest form of recognition in the area of governmental accounting and financial reporting.

National Award of Excellence

In the spring of 2010 CHA received two Awards of Merit from the National Association of Housing Redevelopment Officials (NAHRO). The two projects were The Hall House Project (Program Innovation/Affordable Housing) and Strategic Asset Model (Program Innovation/Administrative Innovation). The Strategic Asset Model has also received a National Award of Excellence.

Section 3

The Section 3 program requires that recipients of certain HUD financial assistance provide job training, employment, and contracting opportunities for low-or very-low income residents in connection with projects and activities in their neighborhood.

CHA has established employment and training goals that contractors and subcontractors should meet in order to comply with Section 3 requirements; 30% of new hires each year to be qualifying public housing residents as a result of contracts with CHA ; and contractors must subcontract at least 10% of the award to committed to qualifying Section 3 business concerns.

In 2009, CHA was successful in increasing its numbers of residents placed in jobs created as a result of CHA contracts by 25% and many residents have expressed gratitude for being provided opportunities.

Designated Housing Plan

CHA has submitted the following proposals to HUD for the Designated Housing Plan:

- Designate eleven of its existing communities for exclusive occupancy by the elderly in the following communities: 940 Brevard, Arbor Glen, Autumn Place, Edwin Towers, McAlpine Terrace, Parktowne Terrace, Prosperity Creek, SpringCroft at Ashley Park, Steele Creek, Strawn Apartments (High-rise) and Woodlawn House Apartments;
- Designate one community, Charlottetown Terrace, for exclusive occupancy by the disabled;
- Designate two communities, Charlottetown and Strawn Apartments (Cottages), for the exclusive occupancy of the elderly and disabled.

IV. Long-term MTW Plan

The Charlotte Housing Authority's long term MTW plan includes strategies which are designed to help meet the unmet affordable housing need in Charlotte, leveraging supportive services, deconcentrating poverty by creating more mixed-income communities, and expanding CHA's jurisdiction. CHA offers a high quality, partnership driven and sustainable continuum of resident services that addresses and removes the

barriers to self-reliance, so that all residents will achieve a high quality of living by advancing towards self-reliance.

As pertains to real estate development, CHA plans to:

- Continue a Dual Development Strategy as both independent/direct developers as well as minor joint venture partner to pursue projects that could become joint ventures;
- Increase our role as a lender and provider of rental subsidies in developments; particularly supportive housing and special needs developments;
- Integrate Real Estate Development, Modernization, Relocation and Asset Management departments to improve efficiencies that would strengthen the CHA's capacity to better manage and develop more units;
- Continue partnerships that would support the education model in the development of family communities, and;
- Work to improve communications at all levels that would alleviate hindrances to day to day project implementation.

CHA recognizes that some of our efforts will have to be considered within the framework of the regulatory environment of the local, state, and federal governments, in addition to the collective community conscience regarding affordable housing, as well as the private sector market forces that most directly impact affordable housing. The outline the agency plans to follow over the next few years includes:

- *Define and Understand the Need for Affordable Housing*

In order to identify and quantify the unmet housing need in Charlotte, CHA, in partnership with its Affordable Housing Study Partners, engaged the University of North Carolina at Charlotte to conduct an affordable housing inventory assessment.

UNCC used the data to formulate projections, identify trends, evaluate existing barriers to housing for these families and individuals and recommended possible strategies to meet the unmet affordable housing need inclusive of supportive services.

- *Address Public/Private Marketplace Factors*

The Charlotte Housing Authority is expanding its role in Transitional and Supportive Housing by providing more units and rental subsidies in the Charlotte community.

- *Determine the Appropriate Structure, Mission and Coordination*

The Charlotte Housing Authority's Board of Commissioners and CEO are discussing changing the structure of the agency by becoming a redevelopment commission and expanding its Section 9 jurisdiction countywide.

- *Advance Suitable Regulatory Reform*

CHA will work to enhance the local regulatory environment in regards to the City of Charlotte's *Housing Locational Policy*, Housing Trust Fund, and zoning in order to reduce the difficulty housing service providers' face in developing more affordable housing units.

In March 2010, CHA received approval from HUD to use MTW funds outside of the Section 8 & 9 programs. With this broader use of funds authorization, CHA anticipates serving an additional 300-500 families. While this only represents a fraction of the affordable housing need in Charlotte, it is a positive step that CHA would be unable to accomplish without the authorization. Additionally, the broader use of funds flexibility will allow CHA to further its efforts to de-concentrate.

- Mobilize Adequate Resources

The Charlotte Housing Authority CEO is working with North Carolina Congressional delegates and advocacy groups to develop a different source of capital for the national trust fund, as well as pursue local foundations and private sector donors to create foundations for affordable housing, education, and supportive transitional housing for homeless families with school aged children.

- Execute Communication/Advocacy Strategies

The agency has formulated an Advisory Committee that consists of a Collaborative Partnership and an Advisory Council to serve as advocates for affordable housing. The Advisory Committee will assist in communicating the overall strategy to make MTW the community's initiative, not just a CHA initiative.

- Tracking CHA's MTW Benchmark

During the course of its participation in the federal Moving To Work demonstration program, CHA will track the success of the Moving Forward initiatives by measuring the following benchmarks:

Benchmark	FY08		FY09	FY10
	PH	Section 8	Pilot Sites	Pilot Sites
The employment rate for able-bodied heads of households and other family members*	31% (402)	43% (1547)	24%(94)	35% (106)
The number of family members in training and/or education programs*	FSS 79 ROSS/GED 168	FSS 23	297	165
The increase in average and median income of families (all sources and earned income) (excluding seniors and disabled families)*	\$10,055	\$11,493	\$13,890	\$12,745
The amount of funds leveraged in the community for production of affordable	CHA was not tracking the data			\$46,494.77

housing and the provision of supportive services					
The number of children who enter post secondary education	CHA has not implemented the tracking of this benchmark item. Release forms must be obtained from households.				
The percent increase in number of CHA students that enter the Charlotte Housing Authority Scholarship Fund (CHASF)	35	41	26	36	Not available until July 2011
The number of housing units in mixed-income environments	909	N/A			903
The distribution of housing units and housing opportunities by zip code for (a) Section 9 and (b) Project-based Section 8	28202-596 28203-699 28204-376 28205-109 28206-224 28208-437 28209-239 28210-83 28211-70	28212-79 28215-89 28216-90 28217-69 28226-49 28227-22 28262-51 28269-156	28202- 596 28203-699 28204-376 28205-109 28206-324 28208-437 28209-239 28210-119 28211-96	28212-79 28215-89 28216-90 28217-69 28226-49 28227-22 28262-51 28269-156	28202- 596 28203-699 28204-387 28205-109 28206-324 28208-437 28209-239 28210-155 28211-96

**This data is CHA wide. Data reported after FY08 tracks those participating in a Case Management Program. In FY09 & 10 only data for Victoria Square, Claremont & Boulevard Communities was reported.*

V. Proposed MTW Activities: HUD approval requested

CHA does not have any proposed activity seeking HUD approval at this time. There is an activity in consideration or in development that may be submitted as a midyear amendment. At this time, the Housing Choice Voucher Program is considering implementing Residences In Select Environments (RISE). The program is being designed to encourage de-concentration by providing incentives for existing voucher holders and new admissions that are selected from the Housing Choice Voucher waitlist to lease properties in non-concentrated areas of Mecklenburg County. This proposed activity will follow the MTW guidelines for a public review period, public hearing, and submission to HUD for approval.

VI. Ongoing MTW Activities: HUD approval previously granted

SELF-SUFFICIENCY INITIATIVES

CHA received approval to implement **Currents of Change** in the Fiscal Year 2008-2009 Moving Forward Annual Plan. The Currents of Change offers job education and job training in three tiers based on participant needs. CHA is engaged in the activity through a Pilot program. There are 3 Pilot Groups. Pilot Group A - Claremont and Victoria Square receive in house case management, Pilot Group B – Boulevard Homes is under contracted case management and Pilot Group C- Leafcrest, Tarlton Hills, and Cedar Knoll is anticipated to be under contract case management in calendar year 2011. There are seven (7) metrics, baselines, and benchmarks for Pilot Groups A & B which are shown in Appendix K. Implementation with Group C has not begun yet. As of August 2010, CHA was in the process of selecting the case management agency for Group C. The Work Requirement will be effective at all sites participating in case management.

CHA received approval to implement **Youth Services** in the Fiscal Year 2008-2009 Moving Forward Annual Plan. The Youth Services initiative connects participants to programs and services that address truancy, post-secondary education preparation, and academic performance improvement. There are five (5) metrics for the Youth Services component of the Currents of Change. These are shown with Currents of Change in Appendix K.

Data sharing is a key factor in identifying students who would be most impacted by targeted services, however, CHA has not been able to secure the appropriate release forms from all households in order for the Charlotte-Mecklenburg School (CMS) system to provide information on the student's school location and academic and attendance performance. Once this has been resolved, CHA's partnerships with CMS and Communities in Schools (CIS) will prove more effective for the youth receiving CHA subsidy.

RENT REFORM INITIATIVES

CHA proposed the activity, **Alternate Review Process**, in the Fiscal Year 2008 – 2009 Moving Forward Annual Plan. Implementation has been delayed. CHA anticipates beginning the activity December 2010 after software updates to accommodate the new MTW 50058 are completed.

When the activity is implemented, CHA will conduct bi-annual reexaminations for elderly and disabled families in both the public housing and Housing Choice Voucher programs. This is a rent reform initiative; however, it is being done for administrative efficiency because the income for the target population is typically stagnant. The schedule will require residents whose lease anniversary month is an even month

(February, April, June, August, October and December) to recertify during the even years beginning winter 2010. Those residents whose anniversary month is an odd month (January, March, May, July, September, and November) will recertify in the odd years, beginning 2011. The benchmark is to reduce the approximately 2,100 recertifications of elderly and disabled to 1,100 annually.

CHA will continue to use the Enterprise Income Verification (EIV) System reports at recertification.

CHA has already begun criminal background checks at recertification for all family members 16 years of age and older.

CHA proposed the activity, **Rent Reform and Work Requirement**, in the Fiscal Year 2009 – 2010 Moving Forward Annual Plan. As of August 2010 the activity has not begun implementation. CHA anticipates beginning the activity winter 2010 after software updates to accommodate the new MTW 50058 are completed.

CHA has modified the formula for calculating families' total tenant payment to provide a financial incentive for participants to increase their earnings. Elderly and disabled household participation will be voluntary.

LOCAL, NON-TRADITIONAL INITIATIVES

In July 2010, CHA received approval to use MTW funds for families 80% and below the area median income, which may or may not be public housing (Section 9) or Section 8 families. The following are descriptions of the activities to be implemented:

CHA proposed the activity, **Charlotte Local Rental Subsidy Program**, in the Fiscal Year 2010 – 2011. The implementation began in FY2011 as well. CHA will partner with local rental subsidy programs and service providers, including Workforce Initiative for Supportive Housing (WISH) and others in Charlotte to provide apartment subsidies and social services to families either working or participating in a self-sufficiency program or educational program and earning less than 30% of the Area Median Income (AMI). The program will target families who are situationally or transitionally homeless. The program may also provide for the use of the subsidy to prevent homelessness by providing assistance to families ready for transition from local shelters. It is a collaborative effort that joins local agencies which are already providing services to this community with funds from the faith community, the corporate community and the public sector. The subsidy is the difference between the families' 30% contribution and the rent. The goal is to help families achieve self-sufficiency within five years by providing comprehensive family development social work, intensive case management, and access to services while the family is permanently housed in a stable apartment community.

Through the use of MTW flexibility, CHA has a benchmark of 25 units for FY12. The agency would like to note that the Charlotte Housing Authority Board of Commissioners approves all commitments for Project-Based Section 8 on a case-by-case basis.

CHA proposed the activity, **Acquisition of General Partnership Interest**, in the Fiscal Year 2010 – 2011. The implementation began in FY2011 as well. CHA, acting through its instrumentality, Horizon Acquisition Corp (“Horizon”) is under contract to acquire the General Partnership interest in the Little Rock Apartments, a 240-unit Section 8 multifamily project. Horizon’s control of Little Rock Apartments is vital to the success of the proposed redevelopment of Boulevard Homes, our adjacent, 300-unit public housing development. By controlling Little Rock, CHA will endeavor to receive approval to provide services and opportunities to Little Rock’s residents through its Moving Forward program. CHA intends to provide self-sufficiency and employment services for Little Rock residents. A social services reserve of \$500,000 will be established at closing for this purpose.

The Little Rock Apartments currently has a HUD issued Multifamily Project Based Section 8-Housing Assistance Payment contract in place, which provides assistance to all 240 families living at the property.

Once the general partner interest for Little Rock is acquired, CHA will obtain income levels for all households. One benchmark will be a 2.5% increase in average income (average of non-elderly and non-disabled families). The baseline for average rent paid is \$75/unit. A second benchmark is a 10% increase in average rent paid. Lastly, there are currently 112 households paying zero rent in the apartment community. The benchmark will be a 5% decrease in the number of households paying \$0 rent. These benchmark targets will be measured 3 years and 5 years from acquisition.

CHA proposed the activity, **Hampton Crete Self-Sufficiency Program**, in the Fiscal Year 2010 – 2011. The implementation began in FY2011 as well. The Charlotte Housing Authority will place public housing units to serve homeless families at the Hampton Crete Apartments and implement a supportive self-sufficiency program. This program will serve homeless families in partnership with the local Salvation Army (TSA) homeless services agency or other designated local service agencies. The Hampton Crete Apartments were acquired by CHA’s non-profit subsidiary, Horizon Development Properties, Inc.

The development currently has 239 units that will be reconfigured into 213 units during the rehabilitation, increasing the number of 3-bedroom apartments in response to CHA portfolio and community demand. Sixty (60) of the 213 units will be refinanced as ACC units, 50-55 units will be restricted to families making 80% Area Median Income and the remaining 98-103 units will have no income

restrictions. While the number of units is decreasing, the agency is proposing that the 60 ACC units will operate as part of our community partnership to serve homeless families, a severe need in Charlotte, NC. As of December 2010 twenty (20) families have moved in with rental assistance funding awarded by the Critical Need Response Fund Task Force. An additional ten families will move-in in January. The construction began in August 2010 and is to be completed by April 2011.

The baselines are set at zero since this is a new activity. The following outcomes will be measured by The Salvation Army and reported to CHA semi-annually for inclusion in the MTW Progress Reports. Data will be collected over 3 years.

<u>Anticipated Outcome</u>	<u>Metric</u>	<u>Baseline</u>	<u>Benchmark</u>
<u>Increased Supportive Housing Units w/Self-Sufficiency Component</u>	# of supportive housing units	<u>0</u>	60
<u>Residential Stability</u>	Number of residents who complete the program	<u>0</u>	80% (48 of first 60 families)
	Number of residents who move to housing with less support	<u>0</u>	70% (42 of first 60 families)
	Number of families who do not return to homelessness	<u>0</u>	95% (57 of first 60 families)
<u>Increased income capacity</u>	Number of residents who gain stable employment	<u>0</u>	<u>87% (52 of first 60 families)</u>
	Number of residents who gain education (GED or other) or job training skills	<u>0</u>	80% (48 of first 60 families)
<u>Youth Outcomes</u>	Number of school age children whose grades improve	<u>0</u>	80% (or a minimum of 48 children)
	Number of school age children with improved attendance	<u>0</u>	90% (or a minimum of 54 children)

CHA proposed the activity, **Provide Gap Financing for McCreesh Place**, in the Fiscal Year 2010 – 2011. The implementation began in FY2011 as well. CHA plans to use MTW funds for a loan to construct units at McCreesh Place and fund public housing rental subsidies. Specifically, the MTW flexibility will allow CHA to: (1) build project Based Section 8 units; (2) upgrade existing units and; (3) structure Section 9 subsidies in such a way that they do not conflict with the operating requirements associated with the Supportive Housing Program subsidies currently being funded to the project. CHA will also use the flexibility to incorporate the Supportive Housing admissions and operating requirements as needed because of current conflicting operating requirements between the Public Housing and Supportive Housing programs.

The need for supportive housing in the Charlotte community is growing, especially in light of the current economic downturn. St. Peter's Homes is an experienced and successful provider of supportive housing in the Charlotte community. The plan is for the minor rehabilitation of 64 Section 9 units (of which 63 will receive Section 9 subsidies) and for the construction of 27 Project Based Section 8 units (of which 26 will receive PBS8 rental subsidies).

CHA proposed the activity, **Construction of Mixed-Income Units**, in the Fiscal Year 2010 – 2011. The implementation began in FY2011 as well. The Lofts at Seigle Point is proposed to be the final on-site component of the Seigle Point HOPE VI redevelopment of the former Piedmont Courts. The development is proposed to be part of a broader mixed-income community. The project will include 190 units of which 80% will be at 80% Area Median Income(AMI) and below and 20% will be affordable to those earning less than 30% AMI subsidized by CHA Project Based Section 8. The overall Seigle Point community has a 10,000 sq. ft. community building, 204 tax credit apartments, 31 market rate townhomes and an amenity area with a playground, tennis & basketball courts and shelter area. Adding the 190 units in this location, very near Charlotte's central business district, will provide added choice for those needing affordable housing. This environment will be an ideal situation for these residents to excel in CHA's Moving Forward program.

CHA proposed the activity, **Acquisition and Renovation of Woodlawn House**, in the Fiscal Year 2010 – 2011. The implementation began in FY2011 as well. Woodlawn House is an existing 104 unit multi-family apartment project. The blighted property has been vacant for approximately 2 years. It is a one elevator building that contains 68 one-bedroom and 36 two-bedroom units. The Charlotte Housing Authority (CHA) will renovate and operate the apartments as housing for seniors in an area they would normally not be able to afford. The benchmark is to establish 52 Section 9 and 52 Project Based Section 8 units. On-site supportive services with close proximity to downtown, transit, and shopping are a few of the amenities to which individuals will have access. This site will also have outdoor areas with walking paths, dedicated resident gardening areas, resident recreation, and picnic areas.

UNIT PRODUCTION INITIATIVES

CHA proposed the activity **Housing for Persons with Disabilities, Special Needs and Homeless**, in the 2008-2009 Moving Forward Annual Plan. The activity was implemented in same fiscal year. The activity enables CHA to expand their role in the supportive housing community by leveraging funding and resources to social service and supportive housing providers. This will help alleviate the existing housing burden.

In the FY11 Annual Plan, CHA received approval to allow supportive housing providers with public housing assistance to waive the lease term requirement in public housing. Eliminating a major conflict between the public housing program and best practices followed by supportive housing providers was critical in establishing more supportive housing partnerships. Most supportive housing programs operate on a month-to-month lease, so requiring them to modify their program to require year leases is significant; especially when it comes to non-compliance and participant termination.

The goal is to increase housing choices by committing to 300 units through financing, new construction, or rehabilitation by 2012. In FY09, CHA added 58 units for the target population. In FY10, an additional 108 units were completed. At the time of the development of the FY12 Annual Plan, 87 units were in development.

CHA proposed the activity, **Increasing The Acquisition/Rehabilitation of Existing Multi-Family Properties** in Fiscal Year 2008 - 2009. The activity was implemented in the same fiscal year. CHA implemented this activity because it was more cost effective and allowed the agency to add more units to inventory in a shorter period of time than new construction. In recent years, the economic downturn allowed CHA to increase unit production in higher income areas of Charlotte. In contrast, if CHA had opted to only build new, it would have severely delayed the addition of units because of construction costs.

CHA's goal is to add 100 units per year at an average cost of less than \$120,000 per unit. In FY09 CHA acquired 110 units with an average cost of \$59,863 per unit. In FY10, CHA acquired 566 units using MTW flexibility at an average cost of \$57,974 per unit. It is noted that 223 of these units did not require rehabilitation. In FY12, the units for this initiative will also be counted with the units in Local, Non-Traditional Initiatives.

Fiscal Year	Property	Units	Cost per unit
2009	Fairmarket Square	60	\$48,667
	Seneca Woods	50	\$71,059
2010	Hampton Creste	239	\$23,013
	Woodlawn House	104	\$80,384
	Mill Pond	168	\$67,500
	McMullen Woods	55	\$61,000

CHA proposed and implemented the activity, **Land Acquisition for Future Use**, in the fiscal year 2008-2009 Moving Forward Annual Plan. The agency implemented the activity in the same fiscal year. The purpose of the activity is to secure as many good locations as possible along the new transit corridors and light rail and in rapidly developing areas of Charlotte to expand housing choices. MTW flexibility enables the agency to option and purchase land (or sites appropriate for demolition and/or rehab) without funding development plans in place which could result in the loss of key opportunities. CHA will certify that it has met the HUD Site Selection Standards.

The benchmark was to acquire one site every two years which would provide a development opportunity of a minimum of 50 units. CHA has been fortunate enough to exceed the benchmark with an acquisition each year since approval. In FY 09 CHA acquired a multi-family site that will accommodate 99 units. The site was 10 acres at \$90K/acre. In FY10 CHA acquired land to develop 120 units of senior housing. The cost for the land averages \$8,810 per unit. In FY11 CHA executed a letter of intent (LOI) with Park & Marsh, LLC (Crescent Resources) to potentially purchase property located adjacent to Savannah Woods, a CHA owned development. MTW funds would be used to purchase the property and the short term strategy would be to “land bank” the property to enhance the planned phase II development of Savannah Woods.

Fiscal Year	Property	Proposed Units	Cost
2009	Krefeld Drive	99	\$90,000 per acre
2010	Steele Creek Seniors	120	\$8,810 per unit
2011	Park and Marsh	TBD	\$675,675 per acre

CHA proposed the activity, **Develop An Affordable Housing Program with Charlotte-Mecklenburg Schools (CMS)** in the fiscal year 2008-2009 Moving Forward Annual Plan. The activity has not been implemented. In FY09 CHA met its goal to identify one site that will be feasible for CHA/CMS development. No new benchmarks have been set since that year because CMS cannot make financial commitments to affordable housing based on the current economic conditions.

Fiscal Year	Property or Location
2009	Boulevard Homes HOPE VI

CHA proposed and implemented the activity, **Community Based Rental Assistance** (Project Based Section 8) in the fiscal year 2008-2009 Moving Forward Annual Plan.

The Charlotte Housing Authority Board of Commissioners voted to approve Community Based Rental Assistance (CBRA) projects on a case by case basis. Therefore, there is no proposed benchmark. The following units have been approved and are in development:

Development	Number of Units
Boulevard Seniors	20
McCreesh Place II	26
Mill Pond	51
Moore Place	51
Savanna Woods	10
Steele Creek Seniors	60
Lofts at Seigle Point	38
Woodlawn House	52
Everett House	10
Total	318

INCREASE HOUSING CHOICE INITIATIVES

CHA proposed and implemented the activity, **Participant and Landlord Tracking (Increase Fair Market Rents)**, in the fiscal year 2007-2008 Moving Forward Annual Plan. The purpose of the activity is to increase fair market rents (FMR) in identified areas of Charlotte/Mecklenburg County that have low Section 8 participation in order to address de-concentration of poverty and increase access to affordable housing opportunities in non-concentrated areas.

CHA utilized the services of the University of North Carolina at Charlotte (UNC Charlotte) to use Geographic Information Science (GIS) mapping to identify each voucher holder within the City of Charlotte/Mecklenburg County. The results indicated that 78% of Section 8 voucher holders reside in 8 concentrated zip codes within the City of Charlotte (28208, 28215, 28216, 28205, 28217, 28212, 28269, and 28213). CHA began including information on the benefits of residing in low minority/low poverty areas in the voucher briefings. CHA is also planning to increase the number of exception payment standard areas within Mecklenburg County based on initial data from HUD’s Small Area FMR demonstration program. This may result in exception payment standards up to or exceeding 120% of HUD’s FMR’s. CHA will also engage a vendor to conduct a housing market analysis in order to determine rental unit availability in non-concentrated areas of Mecklenburg County.

CHA's benchmark is to reduce the vouchers within the 8 concentrated zip codes by 6% (200). It is noted that the % change can be impacted by the utilization rate and number of vouchers available; therefore the actual number of vouchers in the concentrated area is critical to realizing movement. In December 2010 there were 3,397 of 4,765 vouchers in the concentrated zip codes. This reflected a 71.29% concentration. Although there was a percent decrease in the concentrated areas, of the 497 additional vouchers, 191 were in the concentrated areas. Therefore, marketing for new landlords and community acceptance in the less concentrated areas must be aggressive.

CHA proposed the activity **Site-Based Waiting Lists for Public Housing and Project Based Section 8** in Fiscal Year 2008 – 2009. The activity implementation began in the same fiscal year.

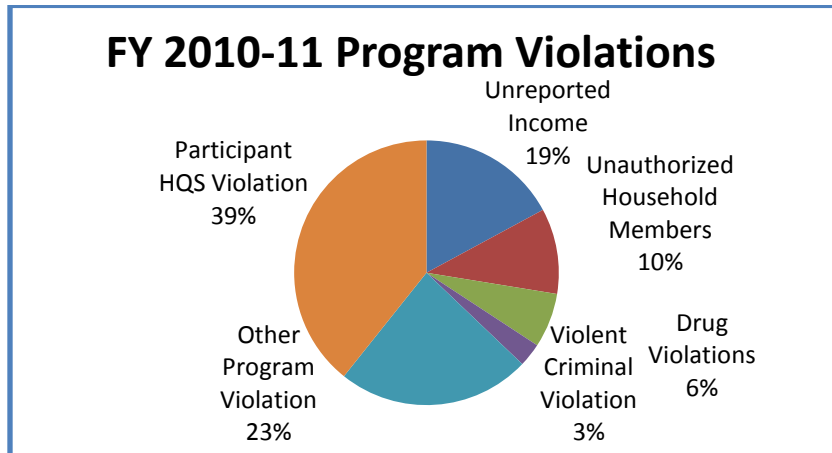
CHA continues to manage the waiting lists for public housing and Project-Based Section 8 at the site level. The objective of the activity is to decrease the percentage of first offers rejected by allowing applicants to apply at the sites of their choice, rather than accept first available on a centralized waiting list. Presently CHA is waiting on software upgrades to track the number of participants who accept the first offer. CHA has not begun a process with the partners to establish tracking of site based waiting list for Project- Based Section 8. The activity is calculated on an annual basis and will be reported on in the Charlotte Housing Authority FY11 Moving Forward Annual Report.

CHA proposed the activity **Occupancy Training** in Fiscal Year 2007 – 2008. The activity implementation began in the same fiscal year. The Charlotte Housing Authority continues to provide a mandated “Good Neighbors” training to all applicants entering the program and for all existing participants. The training is a component of the briefing that all participants must attend prior to the issuance of a Section 8 voucher. The training is designed to assist families acclimate into a neighborhood. Participants learn more about being “Good Neighbors” by focusing on topics such as building codes and standards, property maintenance, basic zoning regulations, home maintenance, and conflict resolution. CHA is redesigning the curriculum to include topics for the public housing residents as well.

As of December 2010, 280 participants completed the Occupancy Training. CHA's benchmark for FY12 will be 300. CHA is conducting the Good Neighbor Training in an effort to decrease the number of lease or program violations that lead to terminations. The table below illustrates the violations and terminations as of third quarter 2011.

SECTION 8 FY 2011 VIOLATION/ TERMINATION COMPARISON				
	Baseline	FY10 Total	FY11 (as of Dec 2010)	Percent of total vouchers
Participants with Violations	385	528	652	14%
Participants Terminated /EOP	302	209	113	2%

The chart below breaks down the violation types which will help the agency identify areas to focus the topics.



CHA was approved and implemented the **Section 8 Property Rating System** in Fiscal Year 2007 – 2008. A quantitative evaluation rating system for the exterior appearance of a Section 8 property was developed to improve the housing quality standards of participating property owners. CHA contracted with Professional Service Industries (PSI) to conduct random exterior inspections on Section 8 properties. A rating system was developed which required all properties participating in the Section 8 Program to have an external property rating system of C or better. At the end of FY10, 99.64% of all properties evaluated have a rating of C or better.

The contract with Professional Service Industries (PSI) ended April 31, 2010. CHA is working with YARDI to input the new metrics for the Property Rating System in the Inspections module so that CHA Inspectors can conduct external inspections in-house. The process of providing rental increases based on inspection score has not been implemented.

CHA was approved and implemented the **Resident Safety Initiative** in Fiscal Year 2009 – 2010. In FY2010 the Resident Safety Department implemented a number of initiatives to decrease Part I crimes in CHA’s public housing communities in order for CHA to attract and retain residents in all CHA communities. The Resident Safety department continues to provide private security at the elderly sites and one large family site. Surveillance cameras are in operation at the high rises and some family sites (560 units). Beginning in 2011 it is anticipated the surveillance cameras will be installed at all remaining targeted family sites. In FY10 there were 855 incidents. This was a 19% reduction from FY09. The initiative has a 5% annual decrease benchmark.

ACHIEVE ADMINISTRATIVE EFFICIENCIES INITIATIVES

CHA proposed the activity to **Amend the Section 8 Housing Assistance Payment (HAP) Agreement** in the 2008-2009 Moving Forward Annual Plan. The activity was implemented in FY2010. CHA amended part A of the Housing Assistance Payment contract in order to require all landlords to participate in direct deposit. The agreement also noted the agency will not enter into a contract in which the landlord does not agree to participate in direct deposit. Additionally, language was added to clarify that CHA is not liable for payment for any period prior to the move in date authorized by CHA. CHA considers this activity completed. The benchmark for FY11 was 100% of the landlords would be enrolled in direct deposit, however, CHA realized that many of the landlords are still under old HAP contracts and cannot be required to enroll in direct deposit until a new HAP is signed. CHA has reached a 93% achievement rate and anticipates meeting the 100% as HAP contracts expire.

CHA is realizing a significant cost savings in mandating landlords participate in direct deposit. The cost of processing paper checks for 117 landlords is estimated at \$12,953.60 per month in comparison to a cost of \$15,724 per month for the 1,576 landlords participating in direct deposit.

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- A. *List activities continued from the prior plan year (s); specify the Plan Year in which the activity was first identified and implemented.*

CHA proposed and received approval for the **Development of Local Design Standards** in the Fiscal Year 2008 – 2009 Moving Forward Annual Plan. The design standards were created in the fiscal year, however utilization has not begun because there were no new construction projects that received funding or started that would necessitate the guidelines being used.

CHA proposed and received approval for the **Adopt Investment Policies Consistent with State Law** in the Fiscal Year 2008 – 2009 Moving Forward Annual Plan. The agency has been using this policy since that time. Although we are currently not earning more interest than our negotiated rate in our banking contract, overall, we have earned more by being allowed to invest in the North Carolina Capital Management Trust (NCCMT). In previous reports CHA noted more than \$11,000 was earned on our investments than we would have had under the standard HUD investment policy. The table below is an example that the rates for the NCCMT are starting to come back up along with the market.

	Bank Rate	NCCMT Rate	Earnings Differential
April 2010	0.25%	0.11%	\$ (115.87)
May 2010	0.25%	0.15%	\$ (42.42)
June 2010	0.25%	0.17%	\$ (9.21)

July 2010	0.18%	0.20%	\$ 53.00
August 2010	0.18%	0.20%	\$ 47.34
September 2010	0.18%	0.16%	\$ (29.79)
October 2010	0.18%	0.14%	\$ (61.86)

CHA proposed and received approval for the **Modify Section 8 Inspection Procedures** in the Fiscal Year 2008 – 2009 Moving Forward Annual Plan and implemented the procedure the same year. CHA received approval from HUD to waive the requirement for an initial Housing Quality Standard (HQS) inspection on newly constructed Project-Based Section 8 units and utilize local building standards inspection and subsequent issuance of a Certificate of Occupancy (CO) as a substitution of the initial or move-in inspection. As of July 2010 the agency utilized this process on 46 of 57 units (80%) and saved \$2,300 on inspections. The agency will continue with this activity.

VII. Sources and Uses of Funding

Please see Appendices C and D for responses to this section.

VIII. Administrative

Resident Participation

The Charlotte Housing Authority held several Customer Annual Planning Sessions to discuss the development and content of the FY12 Annual Plan. The customer feedback and staff responses to these suggestions/comments can be found in Appendix B, in addition to the public hearing documentation.

Acquisition of Central Administrative Office

CHA plans to acquire a new central administrative office building either by purchase of an existing structure or construction of a new facility. Currently, CHA has multiple administrative locations at 1301 South Blvd., & 2600 Youngblood Street which are a part of the Central Office Cost Center (COCC) and at 135 Scaleybark Road in a leased building. Additional staff is located at 316 Benjamin Street & West 10th Street in buildings that are a part of the Asset Management Projects (AMPs). These buildings are spread across the City of Charlotte and contribute to administrative inefficiencies, as well as customer service challenges. Customers will find it convenient and less confusing to address their requests at one location. Relocating to a central administrative office will provide cost efficiencies and save time for both staff and customers.

Combining all administrative staff in one building will create a more effective management environment. This action is available to both MTW and non-MTW agencies with the inclusion of the action in the annual plan.

Agency-directed evaluations of the demonstration

In 2009 the CHA contracted with the Center for Urban and Regional Studies at UNC-Chapel Hill to conduct a long-term, process, outcome and impact evaluation of its Moving Forward program. As part of this work, the Center has been collecting baseline data on the tenants including survey data on employment, housing, and neighborhood conditions, mental and physical health, and school performance among children and teens.

The full evaluation began in 2009 and is expected to go on through 2018, the authorized term of the CHA's Moving Forward program. The process evaluation focuses on the development and implementation of the various components of the Moving Forward program. In addition to the resident satisfaction survey data, it primarily relies on data entered into the Yardi software system, key informant interviews with CHA staff and board members as well as staff members from social service agencies involved in providing employment related services.