

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

The Boston Housing Authority created its Five-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 15,500 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 principles 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 15,500 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 |
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| <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>In the midst of redevelopment of the Charlestown and Mildred C. Hailey developments, current resources are being utilized for the relocation efforts in those projects. Operations <u>is</u> 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 and to work closely with the Admissions Department to ensure there are sufficient pools of applicants to fill vacancies and improve tracking capabilities of expected future vacancies.</p> <p>Stress the importance of Quality Control initiated inspections to be carried out by Operations Senior staff on vacant unit turnover.</p> <p>BHA Operations Division continues to work towards returning to a 97% occupancy rate, though the efforts continue to be impacted by COVID-19 and by the necessary allocation of resources required to relocate resident households who need transferring due to redevelopment projects, including Charlestown and Anne M. Lynch Homes at Old Colony as well as other redevelopment projects impacting the increased number of vacancies due to household returning to redeveloped properties such as Old Colony Beacon and Whittier Street amongst others. At the end of September 20222023, the occupancy rate was 95.5<u>96.8</u>% with the goal of reaching 97% in the current fiscal year.</p> <p>BHA is moving<u>continues</u> to improve occupancy performance on multiple fronts, including increased scrutiny of standards for all turnover units, with inspections prior to showings, maximize marketing and curb appeal to ensure we may minimize the rejection rates. BHA is also exploring ways to</p> |

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| | <p>increase the number of offers to waiting list applicants, and implementing measures to centrally capture and share information on anticipated vacancies, so that the unit turnover and applicant screening processes can begin as quickly as possible. Additionally BHA is identifying ways to collect feedback from waiting list applicants about the wait list experience and site selection process. BHA anticipates using this feedback to inform changes to wait list processes that will improve acceptance rates for housing offers.</p> |
| <p>Maintain 100% Utilization of Section 8 Resources:</p> | <p>The BHA will anticipate expending 9899% of available funding eligibility in 2022-2023 and utilizing 98% of the unit months available under the HUD prescribed voucher baseline. The BHA expects to expend all available funding in 2023-2024 and be fully-leased up to just below the HUD baseline for vouchers.</p> <p><u>2023 update: 16,200 HVC, 480 Emergency Housing Vouchers, 410 Mainstream, 950 State Subsidies, 430 Mod Rehab Vouchers, 400 City Vouchers = 18,870 Total Vouchers; BHA also invests more than \$380 million in private housing throughout our Leased Housing program.</u></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 as well as implementing and setting clear productivity expectations on each indicator.</p> <p>BHA continues to focus on improving/maximizing performance on each of the PHAS components. As has been the case for many large housing authorities, and almost universally in the national rental housing industry, performance in rent collection suffered significantly due to the <u>lingering</u> impact of COVID-19. BHA continues-continued to assist impacted households in submitting applications to the City of Boston <u>through 9/30/23</u>, for federal rental assistance relief funds to pay eligible, COVID-19-related rent balances. BHA continues to work with individual households to stabilize potentially at-risk tenancies by assisting clients with referrals to local non-profit organizations that assist with the payment of rent balances, and management encourages residents in arrears to utilize</p> |

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repayment agreements whenever feasible. The rent collection rate at the end of September was 94.87%. BHA submitted 812 rental relief applications at the close of program eligibility. BHA submitted more than \$5.7 million dollars in rental relief funds to assist residents in addressing eligible arrearages, in addition to RAFT and other sources of rental assistance.

Lease enforcement has been limited due to new requirements regulating the eviction process, but resumed beginning in June of 2023.

In addition to a continued focus on vacancy reduction and rent collection, BHA continues to explore methods to improve maintenance delivery, which should result in better unit conditions ~~and improved inspection scores when HUD REAC returns to a normal schedule.~~ HUD's 2022 REAC PASS inspections concluded in September 2022. Federal properties had not been subject to uniform inspections since 2020 due to COVID-19, so all federal public housing properties were inspected in the 2022 cycle. This is unusual, as roughly 30 to 50% of the BHA's federal portfolio is usually inspected due to the BHA achieving HUD's inspection performance incentive which allows properties to skip the inspections for up to two years based on their scoring (scores of 80-89 earn one year, while scores of 90 to 100 earn a two-year hiatus). During this baseline inspection year, in which all 62 eligible properties were inspected, BHA recorded an average score of 79, and achieved an overall score of 28.27 out of 40 for the PASS indicator.

In FY 2021-2024, BHA implemented a new work-order-system inspection process at the beginning in the second quarter of the fiscal year, ~~and has done significant testing and customization of the~~ utilizing new property inspection software that will make the annual unit inspections and the quarterly common area inspection processes more efficient for staff and residents. This should have positive impacts on deficiency tracking, the

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| | <p>quality of repairs, and the physical condition of the properties, which should also contribute to optimal scoring on the Physical Inspection component of the PHAS assessment.</p> <p>BHA management and maintenance staff will continue to receive <u>undergo</u> training on each component of the Management Assessment and Physical Inspection components of the PHAS assessment standards and scoring criteria, including to prepare for the transition the impending change from UPCS to NSPIRE <u>in the third quarter of FY 2024</u>.</p> |
| <p>2. Strategic Focus: Strengthen and preserve the BHA portfolio of public housing:</p> | |
| <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>BHA senior management continues to meet biweekly, focusing on specific pieces of this effort, which has led to the development of better budgeting tools and enhanced financial reporting. This process is also leading to the development of a framework for reviewing the financial resources, needs, and performance of properties in order to best position BHA to make projections and structural decisions about which BHA communities may be most viable for continued operation as traditional public housing, or may be candidates for conversion to Project Based Section 8, or require another method of subsidy to best sustain as many units as possible as long-term affordable housing resources. BHA is also starting to develop overarching goals for asset management and conducting case studies of conversions to better understand needed staffing and management systems.</p> |

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| <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. In 2021 BHA joined two advocacy agencies, Greater Boston Legal Services and City Life/Vida Urbana to secure a grant through the Innovative Stable Housing Initiative Upstream Fund (the “ISHI Grant”) that is supporting supported 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 has been to compile a toolkit of resources to inform such conversions. That <u>and</u> 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 was extended until the end of 2022. A final version of the Toolkit is available on the BHA website in English, Spanish, and Chinese and shared at the Resident Empowerment Conference.</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) are 90<u>100</u>% complete for 100%all of BHA <u>Public Housing</u> properties. Twenty-one of the properties had CNA Services procured by December 2021 and the CNA assessments occurred during the spring and summer of 2022. The CNAs for all BHA properties will be completed by December 2022. These CNAs assist in planning for immediate and future capital projects.</p> |
| <p>Add new deeply affordable units where possible during redevelopment.</p> | <p>In recent years BHA public housing redevelopment activity has 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</p> |

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Section 8 Project Based Voucher (PBV) units.

At the same time, BHA is also creating net-new deeply affordable housing. “Net-new” means additional new deeply affordable housing units above the number needed to replace (or preserve) the number of original public housing units that previously existed at a given site.

The net-new deeply affordable housing units underway or completed during the 5-Year Plan are as follows:

- O’Connor Way, a new affordable elderly housing community completed in late 2020 and occupied in 2021 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 that completed renovations in early 2021, offers 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 began construction in the fourth quarter of 2021; it includes 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, which completed construction in 2022, includes 55 net-new deeply affordable units as Phase 3C.
- The redevelopment of BHA’s Clippership Apartments, which was completed in early 2021, resulted in a total of 22 PBV Section 8 units, which is 2 more than the original 20 units that were demolished—in other words, 2 net-new rental units—as well as, 30 net-new homeownership units, 16 of which are affordable.
- Holtzer Park, a brand new building which completed construction on vacant land at BHA’s Amory Street site in 2022, is 100% net-new affordable housing: 62 total net-new units, of which 8 are deeply affordable PBV Section 8 units.

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| | <ul style="list-style-type: none"> • <u>The first two new buildings at Mildred C. Hailey (Building 1A and 1B) which began construction in early 2023 include 8 net-new Section 8 project-based voucher units (in addition to 91 replacement Section 8 units plus 124 other affordable units—or a total of 223 units).</u> • <u>The next new building at BHA’s former Amory Street site (which will be known as 127 Amory Street and which will begin construction in 2024) will include approximately 38 net-new Section 8 project-based voucher units, including 6 or more units subsidized through a “Faircloth-to-RAD” mechanism.</u> |
| <p>In furtherance of BHA’s commitment to sustainability, continue to reduce carbon emission toward 38% of 2008 level; and continue to explore climate resiliency, moving from identifying vulnerabilities toward implementing solutions.</p> | <p>BHA looks forward to establishing new goals to reduce carbon emissions to 50% of 2008 levels by 2030 and 0% by 2050.</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 b. Frederick Douglass – Air Sealing c. Hampton House – Air Sealing d. Washington Manor – Air Sealing e. JJ Malone – High Efficiency Hot Water Distribution Pilot f. Ruth Barkley – Heating and Hot Water Boiler Retrofit g. St. Botolph – Add Insulation in Cavities Wall h. Ashmont – Hot Water Boiler Retrofit i. <u>Hassan – Add Insulation in Cavities Wall</u> j. <u>Washington Manor – Add Insulation in Wall Cavities Wall</u> 2. Explore Climate Resiliency: <ol style="list-style-type: none"> a. 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 b. Partnered with City of Boston’s Climate Ready team on strategies contained in the framework of the Heat Resilience Study; exploring pathways for implementation in the future c. Working with City of Boston’s Green Infrastructure team on |

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assessments of priority sites at particular risk for extreme heat and flooding

3. Added Sustainability Planning and Reduction of Use of Fossil Fuels in Housing per Mayor Wu’s State of the City Address January 2023.

a. BHA has engaged a consultant to review strategies for including the reduction of Fossil Fuels in BHA Sites based on the 5YAP heating system replacements and other envelope improvements to help prioritize reductions over the next 7 years.

b. BHA is also working with a consultant to review locations to introduce Solar Energy Systems/Photovoltaic installations at BHA Sites to be installed to provide cost effective use of these systems along with energy improvements to roofing systems replacement.

c. Partnered with the current utility companies to identify potential sites for the introduction of Geothermal Wells for heating and cooling at our larger land area sites.

d. Identifying first target sites for electric vehicle charging stations and secured consultant to deliver recommendations on local fleet transition.

3. Strategic Focus Area: Increase Housing Opportunities through the Leased Housing program:

Apply for additional vouchers as opportunities arise.

In 2021, BHA applied for and received an additional award of 100 Mainstream Housing Vouchers, vouchers allocated for families with disabled non-elderly adult household members bringing the total to 410. 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 910, notwithstanding the units designated for non-elderly disabled families in the project based voucher portfolio. The BHA has utilized approximately 200 Mainstream vouchers, with a majority of the remaining 210 being committed to permanent supportive housing project based voucher developments.

In 2022, BHA applied for Emergency Housing Vouchers (EHVs) and received an allocation of 480 that are currently being issued in cooperation

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| | <p>with the Continuum of Care (CoC). As of the writing of this plan, 420 of 480 EHVs have been issued and more than 200<u>410</u> families have been housed.</p> <p>The BHA also received additional funding for 20 additional VASH vouchers in January of 2021 and another 70 VASH Vouchers in January of 2022, bringing the BHA’s total VASH allocation to 721. The BHA also has a pending application supported by the local Veterans Administration for additional VASH vouchers which will be awarded based on HUD’s determination of local need.</p> <p>The BHA was able to increase utilization for the Family Unification Program (FUP) to near 100% increasing the chances of eligibility for any additional funding opportunities.</p> <p>BHA has also applied for and received 25<u>38</u> Foster Youth to Independence vouchers, <u>26</u> of which have been housed, supplementing the work BHA does with the MA Department of Children and Families.</p> <p>Effective 10/1/2022, BHA expects to receive<u>d</u> an additional allocation of 55 Housing Choice Vouchers.</p> <p><u>Effective 10/1/23 BHA received 57 stability vouchers, to utilize in partnership with the CoC.</u></p> <p>The BHA will continue to apply for additional voucher opportunities as they arise.</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</p> |

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| | <p>to the respective owner for suitability screening. <u>In addition to technology implementation, the BHA is seeking other ways to optimize and streamline the screening process.</u></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 expiring use project at Mercantile Wharf is now under a long-term PBV contract, stabilizing eligible low-income families at the property for years to come.</p> <p>Additionally, the BHA awarded 156 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. In 2021, the BHA awarded 210 Project Based Vouchers (a combination of Mainstream and traditional vouchers) to Beacon Development to preserve and create affordable housing at 140 Clarendon Street. The BHA will continue to solicit Project Based Vouchers, specifically soliciting opportunities to project base Mainstream vouchers.</p> <p><u>Finally, BHA is actively exploring how to use its “Faircloth” capacity—the number of public housing units that BHA is entitled to create—in combination with a mechanism newly articulated by HUD (in 2023) to create new project-based voucher units through HUD’s RAD program. BHA’s aims to use this new “Faircloth-to-RAD” path to create new PBV units with its approximately 2900-unit Faircloth capacity over the coming years.</u></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.</p> |

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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.

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.

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.

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.

The ECHO team will continue to expand its housing search services to BHA families that are facing displacement due to failed inspections and a landlords failure to make repairs and victims of Domestic Violence that have been issued vouchers in order to permit relocation from public housing.

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:

Rebuild resident capacity program to support resident

The Resident Capacity Program provides regular board compliance and

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empowerment and leadership; improve the efficacy and efficiency of Local Tenant Organizations (LTOs), Resident Empowerment Coalition (REC), and Section 8 Tenants Incorporated (S8TI).

- o Develop metrics to track levels of resident organization and engagement.

- o Revise LTO policy, election procedures, and by-laws; pursue strategies to maximize diversity of participants and their level of participation in LTOs.

Tenant Participation Fund training to new and existing Family & Elderly/Disabled Board members in collaboration with Mel King Institute and Boston Resident Training Institute.

Current metrics track LTO Compliance; TPF spending; participation in REC Meetings; LTO meetings and activities. Seven Local Tenant Organization elections were completed in 2023.

The Tenant Participation Policy has been updated and renamed as the Resident Participation Policy after significant public and resident review. The document was streamlined and reorganized for clarity and includes clarification that the policy applied to mixed-finance sites, and provides guidance for use of resident stipends, among other changes.

Holding monthly Resident Empowerment Coalition meetings, now on a virtual basis. Registration for meetings captures first time participants. Meetings were formerly held every other month. BHA staff will continue to host virtual events, meetings, and activities and promote LTO events.

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.

Tenant Participation Fund reports and Laundry fund reports are tracked quarterly, with regular follow-ups and technical assistance provided to LTOs.

Started Youth Council in partnership with SPOKE Art, Inc. The youth leaders connect with other BHA youth and provide feedback to the BHA related to items of importance to youth and young adults.

~~Resident Capacity Program staff currently includes 1 Program Manager,~~

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~~need Coordinator, 2 Program Assistants, 1 Part-Time Intern. The additional staffing capacity allows us to better connect and work with Public Housing, Mixed Finance, and Section 8 residents.~~

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.

Digital Equity: new role at BHA, Senior Advisor for Digital Equity; Hired 1 Digital Equity Coordinator; will post for an additional one

- Received additional funding from City of Boston, Mass Broadband & FCC to support digital equity classes, ACP outreach, and assessment of wiring in public housing
- Wired 17 developments for BoNet

Previously the team provided laptops and tablets to tenant leaders during the pandemic ~~and. Late last year, the BHA engaged~~ in a partnership with the Boston Public Library and City of Boston ~~to distribute~~ free Wi-Fi routers that will be connected through 2023 and free Chromebooks. All residents were provided the opportunity to request these devices; ~~and BHA working now on distributing additional 3000 laptops.~~ BHA has also provided on site digital equity classes and drop-in hours directly through staff and through partnerships with various service providers.

Three boards received training from Mel King Institute as part of their public housing leadership training: Mildred Hailey, Commonwealth, and Charlestown.

Launching 'Powered by the REC' on October 1st: an initiative to increase resident engagement with their LTOs. ~~The draft revised LTO Policy or Resident Participation Policy is being submitted with this year's annual~~

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| <p>Institutionalize resident protections and participation in all redevelopment projects; advance internal BHA systems to ensure long-term compliance by new owners.</p> | <p>plan for comment and approval. BHA collaborated with Greater Boston Legal Services and City Life/Vida Urbana on a grant offered by three hospitals known as Innovative Stable Housing Initiative that was successful. The partners called <u>ed</u> it the Resident Empowerment Project (REP) and its focus is-was to develop tools and trainings and empower residents as they go through redevelopment. The initial grant work wrapped up in summer 2021, and the grant partners drafted a “Toolkit” for resident empowerment shortly thereafter. The Toolkit is finalized and available in multiple languages. Materials are hosted on the BHA website. The grant was extended for an additional year and a fourth public housing site has been added to participate in the grant activities. In addition, a Resident Empowerment conference was held <u>on</u> October 15, <u>2022</u>.</p> |
| <p>Explore voter registration at re-certification.</p> | <p>No update for <u>20222023</u>. Staff will move forward with planning around this goal in <u>20232024</u>.</p> |
| <p>Increase Family Self-Sufficiency (FSS) Participation from 200 to 800 households.</p> | <p>BHA has increased FSS Participation to over 1300 and continues to enroll families. We expect to enroll 1500 families by the end of calendar year <u>20222024</u>, and to have 1,700 enrolled by the end of <u>20242025</u>. We also expect to graduate 200 families by the end of 2024.</p> |
| <p>5. Strategic Focus: Identify and plan for future staffing needs and to support BHA staff:</p> | |
| <p>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.</p> | <p>Working with Human Resources and Finance to identify retirees and devise replacement needs in Operations among other departments <u>agency wide</u>. Identify career development opportunities for staff that could be promoted into new classifications for advancement. BHA continues to reach out to local colleges and universities and has partnered with <u>Bunker Hill Community College and Roxbury Community CollegeYMCA</u> to hire a series of interns who have an interest in pursuing careers in the field of affordable housing. BHA’s Operations Division has partnered with Building Pathways training program and have recruited 2 graduates to enter the work force as Janitor</p> |

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| | <p>Groundskeepers. <u>Both continue to be active members of the BHA community.</u> -We anticipate this relationship will continue, and allow both BHA and City residents the opportunity for employment at the BHA.</p> <p>A Committee of Operations and other Senior staff will be rolling out a new Onboarding initiative <u>launched</u> in Fall 2022, <u>which includes.</u> The initiative will provide a broad overview of the BHA's and Operations Division goals, as well as training sessions to assist with the employee's entry into new positions. Training will be provided to small groups of employees who have either just been hired or promoted to fill a vacant management or maintenance position. There will be<u>Operations has established</u> two training tracks, one will follow the necessary training for management staff, and the second training track will focus on those who have joined our maintenance operations. Training facilitators for both tracks will be current Operations staff that have expertise with the subject matter. The Onboarding Committee's<u>BHA will continue to enhance the onboarding experience with</u> <u>a goal is</u>-to encourage those who participate to view the BHA as career path for future staff development options.</p> |
| <p>Institute additional mentoring and training for the current and the next generation of BHA staff.</p> | <p>Created and implemented intensive 3-month manager training program called Management at its Best since 2020. BHA is also <u>offering a variety of skill building workshops, such as monthly Microsoft Office trainings in Excel, Word, Outlook, etc. and Civility in the Workplace.</u>developing updated onboarding and training processes targeted towards new and recently promoted staff in Operations. <u>In FY2024, Operations will roll out a six-month Manager III training program, providing a career path for Management Aides.</u></p> |
| <p>Continue to promote diverse hiring and employment opportunities for BHA residents.</p> | <p>BHA has been able to provide additional stipends for residents interested in capacity building and engagement work (i.e.; Census, digital equity)as well as for COVID response related work (i.e.; food distribution). Hired BHA resident as Resident Capacity Program (RCP) Assistant.</p> <p>BHA continues to make efforts to recruit, hire, and promote public housing</p> |

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| | <p>residents and voucher holders and is proactively seeking more creative, non-traditional means of candidate recruitment to reach a broader audience of potential applicants. <u>The Resident Training & Internship Program (launched in the Spring of 2023) reached out to over 4,000 student residents and was able to hire 9 resident interns for the summer. BHA is looking to expand on this program, offering paid internships throughout the year.</u> Additionally BHA is working to develop partnerships with training and career development organizations <u>(such as the YMCA Training Inc.)</u> to create opportunities for BHA residents. <u>We hope to launch a resident apprenticeship program for residents interested in Property Management careers in green industries.</u></p> |
| <p>Continue to develop information systems, communications tools, and interactive forums to enhance collaboration, efficiency and productivity across departments.</p> | <p>BHA began piloting its newimplemented 'One Call Now' software to provide automated texting, robocalling and emailing capabilities for more timely and efficient communication with residents. BHA is currently using/testing this software at threeall public housing sites in multiple languages and <u>has training-trained</u> Operations <u>and other</u> staff in its use. <u>Messaging around urgent utility outages (ie; no water, electricity, heat, elevator) are being sent regularly to residents through the BHA's ERS team and messaging related to non-urgent or recurring activities, such as Unity Days, food deliveries, resident meetings, are being sent through the BHA's communications team. Additional messages are continually being developed and will expand into a variety of other messaging such as Living Unit Inspection, work order, rent due messages over time. We anticipate adding other sites to receive messaging in the upcoming months and are also focused on updating our resident contact information. Additional Departments will also use the technology as the initiative rolls out. The tool will also be utilized for messaging to staff and leased housing participants and landlords as appropriate going forward.</u></p> |
| <p>6. Strategic Focus: 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:</p> | |

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| <p>Develop a Customer Service Policy to promote client-focused and consistent service delivery.</p> | <p><u>A Customer Service Representative position has been created within Admissions and Leased Housing.</u></p> <p>An Operations Customer Service and Programs Compliance Manager position has been created and the position has been filled. This position willis working on developing and implementing business process changes designed to improve the accessibility and clarity of information provided to individuals and families as they use the programs and services offered by BHA and ensuring the BHA Reasonable Accommodation policy is adhered to and tracked consistently. The Director of Operations <u>Division and Director of Compliance</u> are working closely with the Director of Human Resources identifying staff's skill development needs, as well as building the needed current and future staff capacity. Actively engaging with the YMCA and colleges providing internship opportunities in an effort to build needed temporary and potential future staff capacity ensuring improved, efficient, and consistent service delivery throughout the Operations Department <u>Agency</u>.</p> |
| <p>Optimize technology to transform interaction with the agency—e.g., landlord and tenant portals, vendor tools, on-line rental payment and direct deposit.</p> | <p>BHA implemented on-line rental payment and automated demand debit rental payments for residents who opt in. Public Housing files are in the 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 to expedite processing, recertifications, rent changes and other business that was strictly handled in person previously.</p> <p><u>In 2023 and 2024, Staff-staff</u> training on handheld tablets with introduction of <u>a mobile work order platform system (Elite) to improve the efficiency of the work order system.</u></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><u>Public Housing files have largely been digitally transferred. All resident records will be stored digitally allowing greater capacity to serve our</u></p> |

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| | <p>residents both in person and virtually. The majority of Public Housing files have been scanned for digital access, with plans in place to scan the remaining files and to continue to revise manual business processes to paperless, digital processing for more efficiency for staff and convenience to residents.</p> <p>The planning of resident portals continues, with a goal of providing an interactive online avenue to conduct many frequent customer service transactions with BHA, including the annual certification process and requesting maintenance service.</p> <p>BHA Operations has implemented a new work order system in 2021, and continues to work on maximizing the system’s functionality and continues staff training on all aspects of the new system moving on from the prior work order system, one of the last remaining components of the legacy property management software, utilized for several decades. The new work order software is a component of the same Elite property management software BHA uses for conducting core business functions such as annual recertifications and financial processing. This transition will allow BHA to more easily create reports that can incorporate data from other areas within Elite, including data pertaining to unit occupancy, certifications, etc. Ultimately, this transition will allow BHA staff who are completing and repairing BHA property to move to mobile devices and transition away from paper reporting.</p> <p><u>In September of 2023, BHA implemented a new component of the Emphasys software, which features a dashboard capable of providing real time information on work orders, vacancies, and other performance metrics.</u></p> |
| Streamline and simplify the housing application process to maximize transparency for applicants and focus staff | BHA has drafted policy revisions that align the application and verification policies across federally assisted programs, to simplify requirements for |

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| <p>efforts on working with applicants who are most likely to be housed in the near future.</p> | <p>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>In late 2021/early 2022, BHA launched a web-based online application system that dramatically simplifies the application process. All applications are now completed online, <u>with exceptions for applicants that require additional assistance</u>. The technology continues to be refined to streamline the application process and reduce administrative burden for the Authority.</p> <p>The information on the website regarding BHA housing programs continues to be added and improved for readability so that applicants may make informed choices.</p> |
| <p>Simplify applicant and resident forms; improve program marketing materials and briefings.</p> | <p>The BHA has revised the Admissions and Continued Occupancy policy aimed at transparency. The BHA will continue working on policy 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 continues to simplify its online application process <u>and improve the quality of the information on the website</u>.</p> <p>BHA has updated and converted several frequently used applicant and resident forms, including the transfer application, the request forms to add household members, and the request form for approval of residual tenancy, to a new fillable pdf format and online forms with the resident/applicant information pre-filled to increase efficiency and</p> |

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| <p>Improve landlord recruitment and retention strategies.</p> | <p>convenience for staff and clients.</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. BHA has developed and conducts landlord outreach and holds briefing sessions on a monthly basis to recruit new landlords and educate existing.</p> <p>The BHA has implemented 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>The BHA continues to streamline paperwork and enrollment processes so that the barrier to become a landlord is minimal. In this coming year, we expect that the request for tenancy approval process will be managed entirely online.</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. In early 2022, the BHA expects to implemented a customer service tracking system, <u>Zendesk</u>, that allows BHA to report and track customer service issues as they are resolved while monitoring responsiveness and consistency. The system will allows BHA clients to report issues by web, email, and phone and receive an issue number that will allow them to follow up on the inquiry no matter who they reach at the BHA. <u>Over 25,000 customer service issues have been resolved since the program launched, with 80% of issues solved on time - a number BHA hopes to continue to improve.</u></p> |

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