

Upland Housing Authority Moving to Work Demonstration (MTW) Program Fact Sheet

The Upland Housing Authority (UHA) proposes, if HUD accepts the UHA's MTW proposal, to modify the current rules applicable to the Housing Choice Voucher (Section 8) and Conventional Public Housing programs in order to encourage and reward self-sufficiency, increase program efficiencies, stabilize program size, decrease errors and omissions, and assist a larger number of low and lower-income families/shorten time on the UHA's waiting list.

The following lists of proposed changes to the programs will apply only to all new households entering the UHA's Housing Choice Voucher Program (Section 8) after HUD approval of the MTW proposal.

The proposed changes will not apply to households participating in UHA's Housing Choice Voucher program prior to HUD approval of the MTW proposal.

Proposed Changes to the Conventional Public Housing Program		
Category	Current Method	Proposed MTW Method
Rent Determination	Rents are determined at least annually based on anticipated family income.	Rent is adjusted every 2 years to the next level in a 3-tiered rent schedule.
Rent Calculation and Income Deductions	Initial tenant rent is 30% of adjusted household income. Income deductions are provided for dependents (\$480 per dependent), elderly/disabled households (\$400 per qualified household), medical expenses and other categories.	Tenant rent is based on 27% of adjusted income. Income deductions are provided for dependents (\$480 per dependent) and elderly/disabled households (\$400 per qualified household) only.
Income Calculation <i>Income Inclusions and Exclusions</i>	Income from assets is <u>included</u> in annual income calculations.	Income from assets is <u>excluded</u> in annual income calculations.
	Foster care and kin-gap income, and TANF sanctions are <u>excluded</u> from annual income.	Foster care and kin-gap income, and TANF sanctions are <u>included</u> in annual income.
Income Calculation <i>Earned Income Disallowance</i>	Earned Income Disallowance requires the PHA to exclude new annual earned income for unemployed individuals who become employed.	The earned income disallowance is eliminated.
Re-Examination Frequency	The PHA must conduct an annual re-examination to determine anticipated family income and calculate tenant rent. Family composition and other data used for reporting and statistical purposes are captured at the annual re-examination.	The PHA will conduct bi-annual re-examinations (every two years) to determine anticipated family income and calculate tenant rent. Family composition and other data used for reporting and statistical purposes will be captured at the bi-annual re-examination.
Minimum Rents	UHA's current minimum rent is \$50.00.	UHA's minimum rent for all residents is \$125.00.

Proposed changes to the Section 8 program are listed on the next page.

Proposed Changes to the Housing Choice Voucher (Section 8) Program

Category	Current Method	Proposed MTW Method
Rent Calculation and Income Deductions	Initial tenant rent is 30% of adjusted household income. Income deductions are provided for dependents (\$480 per dependent), elderly/disabled households (\$400 per qualified household), medical expenses and other categories.	Tenant rent is based on 27% of adjusted income. Income deductions are provided for dependents (\$480 per dependent) and elderly/disabled households (\$400 per qualified household) only.
Rent Determination	Rents are determined at least annually based on anticipated family income.	Rents are determined every 2 years, with the exception of decreases in family income, which will be adjusted the month following that in which the family reports the decrease.
Income Calculation <i>Income Inclusions and Exclusions</i>	Income from assets is <u>included</u> in annual income calculations.	Income from assets is <u>excluded</u> in annual income calculations.
	Foster care and kin-gap income, and TANF sanctions are <u>excluded</u> from annual income.	Foster care and kin-gap income, and TANF sanctions are <u>included</u> in annual income.
Income Calculation <i>Earned Income Disallowance</i>	Earned Income Disallowance requires the PHA to exclude new annual earned income for unemployed individuals who become employed.	The earned income disallowance is eliminated.
Re-Examination Frequency	The PHA must conduct an annual re-examination to determine anticipated family income and calculate tenant rent. Family composition and other data used for reporting and statistical purposes are captured at the annual re-examination.	The PHA will conduct bi-annual re-examinations (every two years) to determine anticipated family income and calculate tenant rent. Family composition and other data used for reporting and statistical purposes will be captured at the bi-annual re-examination.
Utility Allowances	PHA applies utility allowances based on a variety of utility types for each utility paid by the family	Utility allowances will be simplified.
Portability	Families porting into the PHA's jurisdiction are subject to the HCV program rules.	Families porting from another PHA to the UHA's jurisdiction will be subject to the UHA's MTW rules.
Minimum Rents	UHA's current minimum rent is \$50.00.	UHA's minimum rent is \$125.00.
Unit Transfers	Families may move units (transfer) up to once per year.	Families may move units (transfer) up to two times during the family's participation in the HCV program.
HQS Inspection Frequency	The PHA must conduct annual inspections for 100% of assisted units.	The PHA will conduct bi-annual HQS inspections (every two years) for 100% of assisted units.
Portability	Families may move to another PHA's jurisdiction under a billing arrangement without limitation.	Families may move to another PHA's jurisdiction under a billing arrangement only if the receiving PHA will honor UHA's MTW rules. Families may move to another PHA's jurisdiction without limitation if the receiving PHA will absorb the family.

Proposed agency-wide changes are listed on the next page.

UHA proposes the following agency-wide activities:

- **Single Fund Budget:** Fungibility of all PHA administrative and capital funds under a single agency-wide operating budget. This activity will address the statutory MTW objective to reduce costs and achieve greater effectiveness in federal expenditures.
- **Local Verification Policies:** UHA will implement local verification policies for both the Public Housing and the Housing Choice Voucher programs. The UHA will rely primarily on the HUD Enterprise Income Verification (EIV) system for annual and interim recertifications and on documents provided by the applicant with no third party verification required for initial occupancy. This activity will address the statutory MTW objective to reduce costs and achieve greater effectiveness in federal expenditures.