

Moving to Work Agencies' Use of Project-Based Voucher Assistance

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Abstract

The Moving to Work (MTW) demonstration gives selected public housing agencies greater flexibility with their spending and the ability to provide innovative housing assistance to low-income households. This paper explores multiple aspects of MTW agencies' use of project-based voucher (PBV) assistance, including the share of assistance and Housing Choice Voucher budget authority devoted to PBVs, the relationships between PBVs and the Low-Income Housing Tax Credit (LIHTC) and Rental Assistance Demonstration (RAD), the locations of PBV-assisted units, and motivations for using PBVs through case studies of three MTW agencies. We use a combination of HUD administrative data, publicly available neighborhood-level data, MTW plans and reports, and qualitative data. Our findings show that MTW agencies are more likely to use PBVs and RAD than traditional agencies, and that PBVs are used more in tighter housing markets and have a significant overlap with LIHTC properties. The study also finds that there is little evidence that PBVs reach lower-poverty, opportunity-rich neighborhoods. Three case studies underscore the diverse ways that MTW agencies use PBVs to pursue the MTW program's statutory objectives and highlight the importance of local contexts and priorities in agency decisionmaking about PBV use.

Introduction

The Housing Choice Voucher (HCV) program is the largest federal housing assistance program, serving more than 2.3 million households (HUD, 2019). Through the HCV program, the U.S. Department of Housing and Urban Development (HUD) funds both tenant-based vouchers (TBVs) and project-based vouchers (PBVs). With either voucher type, households pay up to 30 percent of their income towards rent and utilities, and the voucher covers the difference. In either case, at least 75 percent of participants must have extremely low incomes, using HUD's income limits, when they are admitted to the program. Unlike TBVs, however, PBVs are attached to specific housing units or properties and are administered through contracts with property owners for

specified periods of time. When a household moves out of a PBV unit, the assistance remains with the unit for the length of the PBV contract.

Systematic research of Moving to Work (MTW) agencies' PBV-use—and PBV-use by traditional public housing authorities (PHAs)—is relevant to HUD and policymakers for several reasons. First, PBVs have become more available to traditional PHAs. The introduction of the Rental Assistance Demonstration (RAD) and other pieces of legislation (discussed below) allow traditional PHAs to designate more vouchers as project-based than was previously permitted and also ease some of the challenges to using PBVs. Second, in some markets, PBVs may be appealing because portable TBVs are difficult to use—whether due to tight rental markets or landlords refusing to accept them. It is difficult to predict, however, whether PHAs will shift from TBVs to PBVs and what the implications of that shift might be. Notably, PBVs limit neighborhood choice, raising concerns about PBV households' exposure to high-poverty neighborhoods. MTW agencies' PBV activities and locations can shed light on potential challenges, opportunities, and tradeoffs of expanded PBV-use. Lastly, documenting the extent to which PBVs are tied to RAD or the Low-Income Housing Tax Credit (LIHTC) program can help policymakers and practitioners understand potential constraints on PBV locations.

This study explores PBV use at MTW agencies through a mixed-methods approach. We examine several questions about PBV locations and the roles of RAD and LIHTC in the PBV program. We use a combination of HUD administrative data, document review, and interviews with staff at three MTW agencies. We focus on MTW PHAs but also examine PBV use among comparably sized traditional PHAs. This article summarizes the research report “Moving to Work Agencies' Use of Project-Based Voucher Assistance” (Galvez et al., forthcoming), which includes additional detail on the research methods and findings.

Background and Literature Review

Why and How Agencies use Project-Based Vouchers

There are several reasons that PHAs might choose to convert a portion of their TBV assistance to PBVs (CBPP, 2017; Cunningham and Scott, 2010). PBVs might be attractive to PHAs in tight or expensive markets and offer more predictable rent costs compared with TBVs. For example, long-term PBV contracts set rent increases over time, even in places where private market rents are rising rapidly.

PBVs may also be a promising option in places where voucher holders have difficulty finding voucher-affordable units or landlords that will accept vouchers—recent research suggests that landlords commonly refuse to rent to TBV holders (Cunningham et al., 2018). PBVs may also allow agencies to serve higher-need households by co-locating supportive services.

They may provide a consistent revenue stream to help agencies finance new housing or rehabilitate existing affordable housing—including through the RAD program, which allows PHAs to renovate and preserve public housing units by converting them to PBVs or Project-Based Section 8 Rental

Assistance (PBRA).¹ Finally, PHAs might view PBVs as an opportunity to create or preserve affordable housing in high-opportunity neighborhoods. As discussed below, HUD provides incentives to traditional PHAs for project-basing in lower-poverty areas.

There are several constraints on the use of PBVs by traditional PHAs.² First, PHAs may not allocate more than 20 percent of their total authorized number of HCVs to PBVs. Second, no more than 25 units or 25 percent of all units in a development (whichever is greater) may be assisted through PBVs unless the property is in a census tract with a poverty rate below 20 percent (in which case the cap is 40 percent of all units). Third, the maximum PBV contract term is capped at 20 years, with the option to renew for an additional 20 years. Finally, to retain neighborhood and housing choice for families in the PBV program, HUD's Family Right to Move requirement allows households to request a TBV once they have lived in their PBV unit for 1 year.³ PHAs must provide the family with the next available TBV.

Constraints differ somewhat for units converted from public housing through the RAD program. RAD PBVs are not included in the 20-percent cap, and agencies can project-base an additional 10 percent of vouchers if they are connected to supportive services or serve vulnerable populations. Additionally, RAD contracts are renewed indefinitely, and residents living in RAD-converted units have a right to choice mobility, which is similar to HUD's Family Right to Move requirement.⁴

MTW agencies have greater flexibility in their use of PBVs, conditional upon approval from HUD's MTW program office. With approval, MTW agencies may devote more than 20 percent of HCV program funds or allocations to PBVs; devote more than 25 percent of the units in a single project to PBVs; create initial PBV contract terms that extend beyond 20 years; establish a "local MTW PBV program,"⁵ including project-basing units at properties owned by the agency (directly or indirectly) and using simplified or existing local property selection processes for project-basing units; and waive or revise the Family Right to Move requirement.

Additional HCV program flexibilities available to MTW agencies include the ability to waive or revise operational policies and procedures, such as the terms of Housing Assistance Payment (HAP) contracts and portability processes; rent policies and term limits; income verification procedures; waitlist policies, such as procedures for maintaining waiting lists, and tenant selection procedures

¹ The Office of Multi-Family Housing Program's Section 8 Project-Based Rental Assistance (PBRA) provides long-term contracts to private for-profit or non-profit owners (including PHA owners) who rent some or all the units in the properties to low-income families. Costs of maintaining and operating the units with low-income tenants are covered by a monthly Section 8 PBRA payment to the private owner. This study does not include PBRA units in its analyses.

² Some of the current restrictions were revised or relaxed from previous program regulations through the Housing Opportunity Through Modernization Act of 2016 (HOTMA). For more information, see <https://nlihc.org/resource/ HUD-provides-guidance-implementing-hotma-project-based-voucher-provisions>. The data used in this study come from before HOTMA's implementation in 2017.

³ See 24 CFR 983.261 for more information on the Family Right to Move provision: <https://www.govinfo.gov/content/pkg/CFR-2017-title24-vol4/pdf/CFR-2017-title24-vol4-part983.pdf>.

⁴ All properties that convert assistance using RAD must provide residents the choice of moving with continuing tenant-based rental assistance using a Housing Choice Voucher (HCV) within an established time after conversion, which is 1 year for PBVs. Unlike the Family Right to Move Requirement, MTW PHAs are not able to waive or modify this provision.

⁵ For more information on the creation of an agency MTW Section 8 project-based program, see Section D.7, Attachment C, of the Standard MTW agreement (https://www.hud.gov/sites/documents/DOC_10242.PDF).

and criteria; Housing Quality Standards (HQS) certification and inspection procedures; and processes to determine what types of funds may be used to rehabilitate or construct units, and changes to procedures to determine a unit's eligibility for PBVs.

MTW agencies document their activities and use of MTW flexibilities in annual plans and reports, but reporting and the level of detail vary by agency, and agencies may bundle activities for the purpose of reporting. For example, Boulder Housing Partners has implemented one activity that covers eight elements of their PBV program and uses a combination of PBV-specific and broader HCV authorizations. The flexibilities include waiving the 20-percent PBV cap on their HCV-authorized units; using a local definition of exception units; waiving the competitive bidding process; establishing local rent limits and reasonableness; allowing owners or service providers to hold the waitlist for their property; allowing Boulder Housing Partners staff to conduct their HQS inspections rather than a third party; and allowing tenants not receiving a subsidy to retain their voucher.

Existing Evidence on Project-Based Voucher Assistance

Prior research has established that MTW agencies use PBVs more than traditional agencies (Galvez, Gourevitch, and Docter, forthcoming; Mast and Hardiman, 2017). Galvez, Simington, and Treskon's (2017) review of MTW agency plans and reports found that nearly all (36 of the 39) MTW PHAs were engaged in at least one PBV activity as of 2015. In 2016, PBVs represented about 12 percent of all assisted units at MTW agencies compared with about 4 percent of all assisted units at comparable traditional PHAs (those serving 750 or more households annually) (Galvez, Gourevitch, and Docter, forthcoming). The share of MTW PBV assistance increased by roughly 8 percentage points from 2008 to 2016 (from about 4 to 12 percent), while the share of PBVs at traditional PHAs increased by only 2 percentage points over the same period (from about 2 to 4 percent). Mast and Hardiman (2017) had similar findings and attributed MTW agencies' more frequent use of PBVs to their ability to use their MTW flexibilities.

Although the rate of PBV usage differs between MTW and traditional agencies, prior research suggests that both types of agencies serve similar populations through their PBV programs, with negligible differences in terms of the share of work-able household heads, head of household average age, household composition and size, and the share of households headed by a person with disabilities. PBVs at both MTW and traditional agencies tend to serve more elderly households and fewer disabled households or households with children compared with TBVs or public housing (Galvez, Gourevitch, and Docter, forthcoming; Mast and Hardiman, 2017). At both MTW and traditional agencies, PBV-assisted household heads were slightly more likely to be White and to be male, and slightly less likely to be work-able than public housing or TBV-assisted household heads (Galvez, Gourevitch, and Docter, forthcoming).

There is no systematic evidence on how PHAs make decisions about PBV use. Prior literature suggests PHAs may use PBVs to preserve or finance new affordable housing stock, to overcome challenges finding landlords that will accept TBVs, or to pair housing with supportive services (CBPP, 2017). No research has directly examined what generally motivates PHAs, or MTW agencies specifically, to use PBVs.

There is a limited body of research on the geographic distribution of PBVs. One study finds that, on average, PBVs tend to be in higher-poverty neighborhoods and are less dispersed than TBVs, although they tend to be in lower-poverty neighborhoods and less concentrated than public housing units (Devine et al., 2003; McClure, Schwartz, and Taghavi, 2015). Looking specifically at households with children, Mast and Hardiman (2017) find the median poverty rate for tracts with PBVs was marginally higher than the median for TBVs (28 percent for PBVs versus 24 percent for TBVs). Similarly, Galvez, Gourevitch, and Docter (forthcoming) find that MTW PBVs and TBVs were in neighborhoods with nearly identical poverty rates. There is limited evidence on MTW agencies' efforts to use PBVs in high-opportunity neighborhoods, but Galvez, Simington, and Treskon (2017) did find that only four MTW agencies—Cambridge, Holyoke, Reno, and King County—were intentionally using MTW flexibilities to reach low-poverty or high-opportunity areas with PBVs.

None of these analyses examine PBV location patterns by race or ethnicity to determine if PBVs may offer different neighborhood opportunities for Black or Latino households compared with TBVs or public housing. Furthermore, no prior analyses examine the role of public housing conversions in PBV locations (as discussed in the following discussion) or the types of neighborhoods in which those conversions are occurring. In tighter or more racially segregated housing markets, it may be challenging for low-income or non-White households to find housing that will accept vouchers outside of high-poverty neighborhoods. PBVs could provide a mechanism for PHAs to identify more promising location options than might be feasible with TBVs. PBVs that originate through RAD public housing conversions, however, will likely resemble the higher-poverty locations of public housing.

Interaction with the Rental Assistance Demonstration and the Low-Income Housing Tax Credit

The potential interaction between RAD unit conversions and the use of LIHTC should be considered when examining PBV use, particularly as they relate to PBV locations. Both RAD conversion and LIHTC-supported rehabilitation and new construction projects typically involve layering PBVs onto new or existing affordable housing properties. There is no research, however, documenting the extent to which PBVs are connected to RAD conversions or are co-located in LIHTC properties.⁶

RAD was authorized under the Consolidated and Further Continuing Appropriations Act of 2012 to help PHAs preserve and improve public housing in need of major rehabilitation. Through RAD, PHAs can convert public housing to either PBVs or PBRA. Because RAD is a housing preservation program, HUD waives the PBV program's poverty deconcentration goal. RAD was initially authorized up to 60,000 units for conversion, and Congress has gradually raised the cap to 455,000 units as of 2019. The uptake by PHAs has followed this expansion. An interim evaluation published in 2016 identified 39,042 RAD conversions in 359 projects (Econometrica, Inc., 2016), a number that has grown to approximately 135,210 as of July 2020. For both MTW and traditional

⁶ HUD's RAD Resource Desk provides project-level information on RAD projects, including the number of units converted, whether the conversion used tax credits, and whether the conversion used PBVs or PBRA. For more information or to download the data, see: https://www.radresource.net/pha_data.cfm.

PHAs, the extent to which PBV-assisted units are in converted public housing properties may be important in explaining PBV locations. If a large proportion of PBV units nationally are in former public housing properties, PBV locations will very likely resemble public housing locations.

LIHTC gives private investors a federal income tax credit in return for making equity investments in affordable rental housing.⁷ State policies for awarding tax credits vary widely and may include additional tax credits awarded to projects in high opportunity neighborhoods as well as areas with a higher poverty rate, a large number of low-income households, or with particularly high development costs (Ellen et al., 2015; Scally, Gold, and DuBois, 2018). Research and anecdotal evidence suggest there is considerable overlap between LIHTC and the HCV program (Climaco et al., 2009; O'Regan and Horn, 2013), although no data source comprehensively overlays voucher and LIHTC assistance or differentiates TBVs from PBVs.⁸ Prior research also shows that LIHTC properties are more likely to be found in suburban areas compared with HCVs (Ellen, O'Regan, and Voicu, 2009; Freeman, 2004; McClure, 2006). As with RAD, the degree of overlap between the PBV and LIHTC programs could have implications for PBV neighborhood locations, but it is difficult to estimate whether the co-location of PBV units in LIHTC properties might expand or impede access to lower-poverty neighborhoods.

Research Approach

The remainder of this article explores five research questions, detailed below.

Research Question 1: How extensively do Moving to Work agencies use project-based vouchers?

The first research question quantifies MTW agencies' PBV activity using 2016 HUD administrative data from the Public and Indian Housing Information Center (PIC), the Voucher Management System (VMS), the RAD Resource Desk, and a database of MTW activities developed for the evaluation. Specifically, we examine:

- How many MTW agencies report PBV-assisted households in HUD administrative data?
- Which MTW agencies have the most active PBV programs?
- How frequently do MTW agencies use their PBV flexibilities?

We identify four measures of PBV activity as of 2016. For the measures calculated using HUD administrative data, we contrast PBV use by MTW agencies to that of the comparison group of similarly large traditional PHAs. The four measures are:

1. The number and percent of MTW agencies with PBV-assisted households.
2. The number and percent of all MTW-assisted households served through PBVs.

⁷ See Scally, Gold, and DuBois (2018) for information on the LIHTC program.

⁸ For example, O'Regan and Horn (2013) had access to subsidy information for LIHTC properties in one state and estimated that roughly 23 to 26 percent of households in LIHTC properties had vouchers.

3. The percent of HCV budget authority that MTW agencies devoted to PBVs.
4. The number and percent of agencies that used their MTW flexibilities to exceed the cap of 20 percent of HCV budget authority allocated to PBVs.⁹

Research Question 2: What factors are associated with Moving to Work and traditional agencies' use of project-based voucher assistance?

We use linear regression to explore factors associated with PBV use. To increase our sample size and statistical power, the regression model is estimated using a sample of MTW agencies only (N=34) as well as a larger sample that includes large PHAs and MTW agencies (N=446).¹⁰ We use data from PIC, the American Community Survey (ACS), HUD's Affirmatively Furthering Fair Housing (AFFH) database, Real Estate Assessment Center (REAC) Physical Assessment Subsystem (PASS), and the Zillow Rent Index (ZRI).

The model uses the linear form:

$$\text{Percent PBV}_{2016} = \alpha + \beta_1 * x_1 + \beta_2 * x_2 + \dots + \beta_n * x_n + \gamma * \text{PercentPBV}_{2009} + \epsilon \tag{1}$$

to estimate the relationship between the *share of assisted households reported in PIC that were assisted through PBVs in 2016* ($\text{Percent PBV}_{2016}$) and several factors (x_1 to x_n) that might motivate PHAs to expand their use of PBVs, while accounting for a baseline level of PBV use (PercentPBV_{2009}). Specifically, we examine the following motivating factors. First, we include logged average rental prices measured with ZRI¹¹ in 2016 and percent change in rents between 2011 and 2016 to determine if agencies in tight, competitive housing markets, where it may be harder to use TBVs, have a greater incentive to use PBVs. In addition, we measure public housing distress prior to the RAD launch in 2012, using REAC PASS scores from 2008, and include the share of assisted households that lived in public housing in 2009, since we expect that PHAs with more distressed public housing would be more motivated to take advantage of HUD programs such as RAD or Section 18 Demolition and Disposition that would allow them to improve and convert their public housing stock and transition units to PBVs. Finally, the model includes indicator variables for U.S. Census Bureau regions. The model also includes a regression constant, α , and heteroskedastic error term, ϵ .

Research Question 3: To what extent are Moving to Work agencies' project-based vouchers located in Rental Assistance Demonstration or Low-Income Housing Tax Credit properties?

Three measures capture the extent to which MTW agencies' PBV programs interact with RAD and LIHTC as of 2016:

⁹ Prior to 2017, traditional PHAs were able to allocate 20 percent of their budget authority to PBVs. HOTMA shifted the formula and cap to 20 percent of agencies' voucher allocations.

¹⁰ The full sample of 39 MTW agencies with MTW designation as of 2019 is reduced to 34 agencies because of a combination of data limitations. The housing authorities of the County of Santa Clara and the City of San Jose report data jointly into PIC and were entered into our analysis as a single PHA. Missing PASS and Zillow data required removing four PHAs. The analysis includes 412 comparison PHAs for whom PIC, PASS, and Zillow data were available.

¹¹ ZRI and Zillow Home Value Index data were acquired from www.zillow.com/data on November 28, 2018. Aggregated data on this page is made freely available by Zillow for non-commercial use.

1. The number and share of each MTW and traditional agency's PBV units that were former public housing units converted to PBVs through RAD (regardless of occupancy status) as of 2016.
2. The number and share of each MTW agency's PBV-assisted households living in former public housing units converted to PBVs through RAD as of 2016.
3. The number and share of each MTW agency's PBV-assisted households living in LIHTC properties in 2016.

We use 2016 data from PIC, the RAD Resource Desk, and the National Housing Preservation Database.

HUD administrative data does not directly identify which PBV units were converted from public housing, so it is necessary to use a combination of administrative data sets to differentiate the RAD-converted PBVs from other vouchers and to identify households living in those units in 2016. We first identified all MTW agency public housing addresses reported in PIC in 2012 through 2016 to create an inventory of properties in existence immediately prior to the availability of RAD (which was enacted in 2012). We then matched the MTW public housing addresses to RAD "First Component" address data¹² for more than 44,000 units converted and "closed" through 2016 to identify the properties converted during the first 4 years of the program. We then use 2016 PIC data to identify all households reported as living in PBV-assisted units and to identify those in PBVs that were converted through RAD.

To identify the overlap between PBVs and LIHTC properties, we used ArcGIS to map the addresses of all MTW PBV-assisted households in 2016 PIC data, and all LIHTC properties active as of 2015 in the National Housing Preservation Database.^{13, 14} We drew a radius of 200 feet around each LIHTC property—the equivalent of about one city block—and defined all PBV addresses that fell within that radius as located in the LIHTC property.¹⁵ We then determined the share of each MTW agency's PBV-assisted households located in LIHTC properties. We repeated this analysis for MTW TBV-assisted households for comparison.

Research Question 4: Are Moving to Work agency project-based vouchers in lower-poverty, higher-quality neighborhoods, and do project-based voucher locations vary by household race or ethnicity?

To answer these questions, we first assess whether PBV-assisted households are in higher- or lower-poverty neighborhoods (census tract) relative to three comparison points: (1) other neighborhoods in their same housing markets; (2) households assisted by the same PHA but with TBVs or living

¹² RAD's First Component allows PHAs to convert public housing properties to either PBVs or PBRA (see PIH Notice 2012-32).

¹³ We use all properties placed in service between 1987 and 2015 with active LIHTCs as of 2015.

¹⁴ This method was chosen after preliminary analysis showed that issues with data quality, changes in street addresses after redevelopment, and differences in coordinate precision and formats prevented exact location matching between PIC, the RAD Resource Desk, and the National Housing Preservation Database.

¹⁵ City block sizes vary widely across the country (Handy, Butler, and Paterson, 2003), and can be as small as 200 feet to 800 feet or more. We use a radius of 200 feet since existing studies treat 200 feet as a lower bound for the size of an average city block (Galvez et al., 2014). We conducted a sensitivity analysis using varying radii for the LIHTC matching, which we include in appendix G of the full report (Galvez et al., forthcoming).

in public housing; and (3) the locations of PBV units at traditional agencies. We also compare differences in neighborhood characteristics for PBV, TBV, and public housing locations by the race and ethnicity of the assisted households.

To account for regional variation, we construct indicators of neighborhood quality that are normalized by county, which allow us to compare location outcomes across MTW agencies while accounting for the poverty levels or other characteristics of the housing markets that each agency serves. The county-normalized neighborhood poverty rate of each household is calculated by dividing the poverty rate of the household's census tract by the county poverty rate, using estimates from the 2012–2016 ACS 5-year sample.

The average county-normalized neighborhood poverty rate for MTW PBV households is then compared with that of households assisted through TBVs by the same MTW agency and households in public housing assisted by the same MTW agency. We then compare the following: the county-normalized neighborhood poverty levels of MTW PBV locations to that of comparison traditional PHAs' PBV locations; the difference between PBV and TBV county-normalized neighborhood poverty levels for MTW agencies and that of the group of comparison traditional PHAs; and the difference between PBV and public housing county-normalized neighborhood poverty levels at MTW agencies with that of comparison traditional PHAs.

Each comparison is repeated using six additional county-normalized measures of neighborhood (census tract) quality drawn from a combination of ACS and AFFH data. The measures are labor force participation rate (2012–2016 ACS 5-year estimates); the percent of adults with a bachelor's degree (2012–2016 ACS 5-year estimates); Labor Market Engagement Index (HUD AFFH data); Environmental Health Index (HUD AFFH data); School Proficiency Index (HUD AFFH data); and Low Transportation Cost Index (HUD AFFH data).

The AFFH labor market engagement, environmental health, and low-cost transportation indices are percentile ranks, nationally. The school proficiency index is a percentage rank by state. For all four indices, a higher score represents a more desirable or higher-quality area. That is, higher values mean more labor market engagement, fewer environmental hazards, better schools, or lower transportation costs. A county-normalized value of 1 means that the assisted households are in neighborhoods that are typical for the county.

We then examine locations for Black or African-American (non-Hispanic/Latino), Hispanic/Latino, and White households. These analyses allow us to examine whether assisted households' race or ethnicity is associated with differential access to lower-poverty, higher-quality neighborhoods, depending on the form of housing assistance.

Research Question 5: What are the agencies' motivations for project-based voucher use?

Based on our initial data collection and analysis for this study, we select three agencies with extensive or innovative PBV programs: Boulder Housing Partners, the Cambridge Housing Authority, and the Seattle Housing Authority. These agencies are among the highest users of PBVs among all PHAs nationally; the average MTW agency with any PBV units devotes approximately 13

percent of their HCV budget authority to PBVs, while these three agencies, on average, devote 47 percent. These case studies are not exhaustive, but they identify common themes across a subset of agencies with substantial PBV use.

To understand the agencies' PBV efforts, we reviewed publicly available documents such as MTW annual reports and plans¹⁶ and agency strategic or administrative plans. Each of the PHAs reviewed and verified PIC data summarizing their PBV use. We also conducted group phone interviews with three to four people in senior leadership roles at each agency who were knowledgeable about the origin and priorities of the agencies' PBV programs. These group phone interviews included executive directors, HCV program directors, asset management directors, or policy staff.

Six interviews and follow-up calls were conducted with MTW agency staff in fall 2018. Interview topics focused on an overview of the agencies' PBV programs, agencies' motivations and goals for using PBVs, benefits and tradeoffs of PBV use, and how PBVs help meet MTW statutory objectives or other goals. We also discussed the specific MTW PBV flexibilities that were the most useful and local partnerships that involve PBVs.

Findings

Research Question 1: How extensively do Moving to Work agencies use project-based vouchers?

MTW agencies are more likely to administer PBVs compared with traditional PHAs and, on average, dedicate a larger share of their housing assistance to PBVs (exhibit 1). Nearly all MTW PHAs reported at least one PBV-assisted household in PIC in 2016, versus 56 percent of the comparison traditional PHAs. MTW agencies served more than 41,000 PBV households that year, representing almost 1 in 10 MTW-assisted households. The group of comparison traditional agencies served slightly more than 105,000 PBV households that year, accounting for about 4 percent of their overall housing assistance.

On average, the MTW agencies devoted 13 percent of their budget authority to PBVs, compared with 5 percent at comparison traditional PHAs. Nevertheless, most MTW agencies' PBV use falls below the 20-percent budget authority cap applied to traditional PHAs, and extensive use of PBVs among MTW agencies was rare. As of January 2017, only 9 of the 39 MTW agencies devoted more than 20 percent of their budget authority to PBVs.

¹⁶ MTW housing authority plans and reports are available on HUD's website. See "Moving to Work (MTW)–Participating Sites," HUD, http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/ph/mtw/mtwsites.

Exhibit 1

Project-Based Voucher Use at Moving to Work Agencies and Comparison Traditional Public Housing Authorities

Measures	MTW Agencies	Comparison Traditional PHAs
Total PBV households (2016)	41,270	105,669
Percent PBV assisted households (2016)	9.7%	4.0%
Percent of PHAs with any PBVs (2016)	92.1%	56.1%
Average budget authority to PBVs (January 2017)	13.1%	5.4%

MTW = Moving to Work. PBV = project-based voucher. PHAs = public housing agencies.

Notes: We exclude Moderate Rehabilitation units. Comparison of traditional PHAs served more than 750 total households in 2016. The average percent of budget authority devoted to PBVs includes agencies with zero budget authority devoted to PBVs.

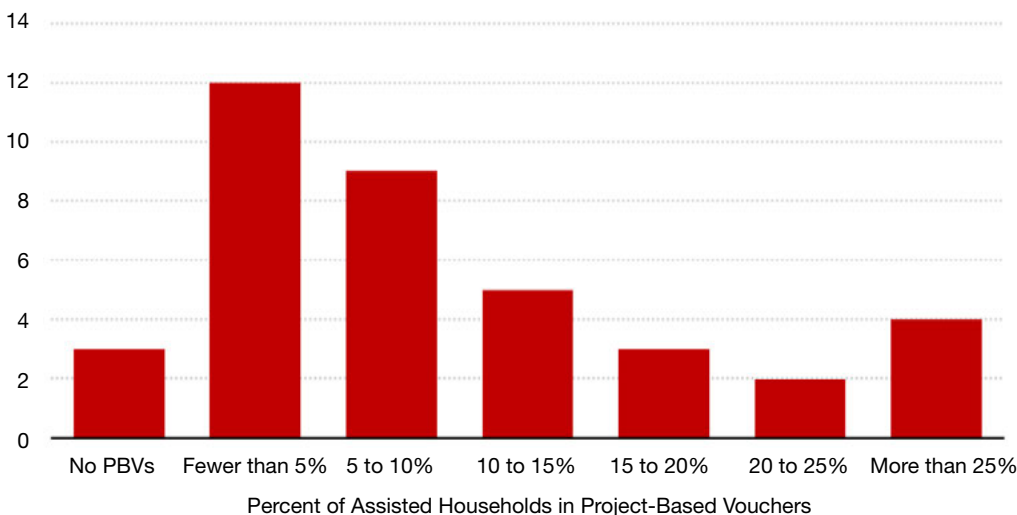
Sources: 2016 HUD Public and Indian Housing Information Center data; January 2017 Voucher Management System data; 2015 Moving to Work Annual Plans

There is considerable variation in PBV use across MTW agencies. In 2016, 12 MTW agencies used PBVs relatively sparingly (fewer than 5 percent of their assisted households), and three MTW agencies had no PBV-assisted units (exhibit 2). At the other extreme, four MTW PHAs— Cambridge Housing Authority, Keene Housing, Boulder Housing Partners, and the Atlanta Housing Authority—served more than one-fourth of their assisted households through PBVs. These four agencies combined represent 9,554 units, or 23 percent, of all MTW PBVs. Additionally, the MTW agencies with larger shares of households assisted with PBVs also devoted greater shares of their HCV budget authority to PBVs.

Exhibit 2

Moving to Work Agencies' Project-Based Vouchers as Percent of Assisted Households, 2016

Number of Moving to Work Agencies



PBV = project-based vouchers

Notes: Sample excludes Moderate Rehabilitation and includes only project-based vouchers. The Housing Authority of the County of Santa Clara and the Housing Authority of the City of San Jose jointly report data into HUD Public and Indian Housing Information Center (PIC) (for a total of 38 Moving to Work observations).

Source: Urban Institute analysis of 2016 HUD PIC data

Research Question 2: What factors are associated with Moving to Work and traditional agencies' use of project-based voucher assistance?

MTW agencies' use of PBVs grew substantially between 2009 and 2016, from about 3 percent of their total assisted households to 11 percent.¹⁷ During this time, 10 additional MTW agencies began offering PBV units. Among the group of comparison traditional PHAs, the increase in PBV use was more modest: from about 1 percent of all assisted households in 2009 to approximately 4 percent in 2016. Additional summary statistics are presented in Galvez et al. (forthcoming).

Linear regression clarifies which factors are associated with the growth in PBV use across agencies. The model predicts PBV use in 2016 using the agency's region, the quality and size of the agency's public housing stock in 2008 and 2009, the extent of PBV use in 2009, the level of rents in the agency's service area in 2016, and the growth of rents between 2011 and 2016.

Using a sample of both MTW and comparison traditional PHAs (exhibit 3, column 1), we find that PHAs with more distressed public housing in 2008 used more PBVs in 2016. The model shows that receiving five fewer points on a PASS score in 2008 is associated with having an additional 0.7 percent of households in PBV units 8 years later. Although that is a small percentage of total assisted households, considering that the average large PHA (MTW or traditional) relied on PBVs to support only 4 percent of households, it represents a nearly 18 percent increase in PBV units.

Exhibit 3

Model Results: Factors Related to the Percent of Assisted Households Assisted by Project-Based Vouchers in 2016 (1 of 2)

	MTW and Comparison Traditional PHAs	MTW PHAs
Percent Public Housing (2009)	-0.011 (0.018)	-0.019 (0.232)
REAC PASS Score (2008)	-0.002* (0.001)	0.000 (0.006)
Rent Index (2016)	0.040*** (0.013)	0.093 (0.091)
Change in Rents (2011 to 2016)	-0.036 (0.028)	-0.264 (0.206)
South	-0.009 (0.010)	-0.169* (0.093)
Midwest	-0.008 (0.010)	-0.173* (0.100)

¹⁷ We use a different calculation of total PBV use for the regression analysis compared with the assessment of MTW agencies' PBV use in research question 1, resulting in a slightly different share of PBV use. For the regression analyses, we calculate an average of the percent PBV use at each MTW PHA.

Exhibit 3

Model Results: Factors Related to the Percent of Assisted Households Assisted by Project-Based Vouchers in 2016 (2 of 2)

	MTW and Comparison Traditional PHAs	MTW PHAs
West	-0.000 (0.011)	-0.131 (0.113)
Percent of HHs in PBVs in 2009	1.181*** (0.143)	1.019*** (0.365)
Constant	-0.027 (0.033)	0.001 (0.300)
Observations	446	34

HHs = households. MTW = Moving to Work. PBV = project-based voucher. PHAs = public housing agencies. REAC = real estate assessment. PASS = physical assessment.

* $p < 0.10$. ** $p < 0.05$. *** $p < 0.01$.

Notes: Samples include MTW PHAs and traditional PHAs with at least 750 households in 2016 and for which both REAC and Zillow data were available. For MTW PHAs, this excludes four PHAs. Housing Authority of the City of San Jose and Housing Authority of the County of Santa Clara household counts in HUD Public and Indian Housing Information Center (PIC) are reported jointly and listed here as a single PHA. Standard errors are heteroskedastic robust and displayed in parentheses.

Sources: Urban Institute analysis of 2016 PIC data, 2011 and 2016 Zillow Rent Index data, and 2008 Real Estate Assessment Center Physical Assessment Subsystem data

We also find that agencies in cities with higher rents use PBVs more extensively. Even after controlling for geographic region and the rate at which rents are rising, we find that a 10-percent difference in the price of rent is associated with a 0.4-percentage-point difference in the share of households served with PBVs (exhibit 3). Our analysis does not identify a relationship between the percent of assisted households in public housing in 2009 and the percent in PBVs in 2016 or any regional differences in the expansion of PBV use between 2009 and 2016.

The regression model lacks precision when it uses the smaller sample of only MTW agencies (exhibit 3, column 2). It is unable to determine whether the estimated relationships between PBV use and public housing quality and the cost of rent are applicable to MTW agencies specifically. Yet, the model shows that, among MTW agencies, PBVs are used more extensively in the Northeast than in the South or the Midwest, with smaller differences between the Northeast and the West.

Research Question 3: To what extent are Moving to Work agencies' project-based vouchers located in Rental Assistance Demonstration or Low-Income Housing Tax Credit properties?

MTW agencies frequently use RAD, and there is considerable overlap between MTW agencies' PBVs and LIHTC properties. In 2016, almost 40 percent of all occupied PBV units at MTW agencies, representing 16,331 households, were former public housing units converted through RAD or located at LIHTC properties. The remaining 60 percent of PBVs (24,939 households) were not associated with RAD or LIHTC properties.

By the end of 2016, 15 MTW agencies (39 percent) converted 11,272 public housing units through RAD, compared with 32,996 units converted by 97 of the traditional PHAs in our comparison group (12 percent of 788 PHAs). MTW RAD conversions represented over one-fourth of all RAD conversions among our sample of PHAs. In total, in 2016, about 14 percent of all MTW PBV-assisted households reported in PIC were living in former public housing developments converted through RAD (about 5,700 MTW PBV-assisted households).¹⁸

The MTW agencies were more likely than the traditional PHAs to convert units to PBVs than to PBRA. MTW agencies converted about 77 percent of their RAD units to PBVs, whereas traditional agencies converted 55 percent of their RAD units to PBVs. The average number of units per RAD property converted to PBVs was similar for MTW agencies and the group of comparison traditional PHAs (105 units on average versus 107).

Differences in RAD use remain if conversions that are still in progress as of March 2018 are included in the analysis: 22 of the 39 MTW agencies (about 56 percent) had RAD projects in progress or completed as of March 2018, compared with 183 of the 788 traditional PHAs (23 percent).

LIHTC properties accounted for more than one-fourth of all MTW agencies' PBVs (about 27 percent, or 10,984 households) in 2016, using addresses within 200 feet of a LIHTC property address as a proxy for co-location. The share was substantially smaller for TBVs: about 8 percent of MTW TBVs, or 21,334 households, were in LIHTC properties.

A small number of the MTW agency PBVs (387 of all PBVs, or about 1 percent) were RAD-converted units that include LIHTC. Some anecdotal evidence suggests the RAD process can be difficult to coordinate with LIHTC, which may explain the low overlap of RAD and LIHTC in the relatively early years of the RAD program.¹⁹

RAD use and the extent of overlap between the PBV and RAD or LIHTC programs varied considerably across MTW agencies. Among the MTW agencies with closed RAD PBV units by the end of 2016, the total number of units ranged from 88 to 2,083. Twenty-four of the 35 MTW agencies with any PBV-assisted households reported in 2016 had PBVs located in properties with LIHTC. The overlap ranged from 3 percent of their PBV-assisted households to 65 percent. All MTW agencies had at least some TBVs located in properties with LIHTC, ranging from about 0.3 percent of all TBV units to slightly more than one-fourth.

Research Question 4: Are Moving to Work agency project-based vouchers in lower-poverty, higher-quality neighborhoods, and do project-based voucher locations vary by household race or ethnicity?

Our analysis finds that MTW agency PBV-assisted households lived in neighborhoods with higher poverty rates, lower levels of educational attainment, lower labor market engagement, lower environmental quality (more potential exposure to environmental toxins), and lower performing

¹⁸ A small number of MTW RAD units were identified in PIC data as TBVs, likely due to PIC data entry or reporting errors. We omit these units from our analyses.

¹⁹ See, for example, Lessons from RAD <https://www.huduser.gov/portal/pdredge/pdr-edge-featd-article-010818.html>.

schools compared with the county average (exhibit 4). The comparative analysis with TBV and public housing shows mixed results, however.

Unlike the national measures, county-normalized measures account for differences in cost of living, access to education, and labor markets across regions. For context, the average county poverty rate across the sample is about 15 percent, and 90 percent of PHAs are in counties with poverty rates between 10 and 23 percent (using data from 2016). The average poverty rate for neighborhoods with PBV households at MTW agencies is 28 percent—about 85 percent higher than if PBV units were distributed evenly across richer and poorer neighborhoods.

Exhibit 4 shows a comparison between PBV locations and the locations of TBVs or public housing at the same MTW PHA. This analysis shows that PBVs are in tracts with higher poverty rates than TBVs. The average difference in county-normalized poverty rates between PBV and TBV tracts is 27 percent of the county poverty rate (exhibit 4). This difference is statistically significant ($p=0.001$). MTW agencies' PBVs are in neighborhoods with similar poverty rates as public housing neighborhoods. Although public housing neighborhoods have higher poverty rates than PBV neighborhoods (an average of 2.0 times the county average compared with 1.85 for PBVs), the difference is not statistically significant (exhibit 4).

We found that PBV households at MTW agencies live in neighborhoods with higher educational attainment and lower transportation costs in comparison to both TBV and public housing households. The average MTW PBV household lives in a neighborhood in which the share of adults with a bachelor's degree is 17 percent below the county average. Yet, the typical MTW household assisted with TBVs is in a neighborhood in which the share of adults with a bachelor's degree is 26 percent below the county average, and the typical MTW household in public housing lives in a neighborhood in which the share of adults with a bachelor's degree is 29 percent below the county average. Lower transportation costs were expected because census-tract poverty rates and the transportation cost index are inversely correlated.

Exhibit 4**County-Normalized Measures of Neighborhood Quality for Assisted Households at Moving to Work Agencies by Program, Averages and Differences, 2016**

Neighborhood Quality Measures	Means		Differences (p. value)	Means		Differences (p. value)
	PBV	TBV	PBV – TBV	PBV	PH	PBV – PH
Poverty Rate	1.85	1.58	0.27*** (0.001)	1.87	2.03	-0.16 (0.124)
Percent with Bachelor's Degree	0.83	0.74	0.10** (0.029)	0.82	0.71	0.11 (0.064)
Labor Force Participation	0.96	0.97	-0.02 (0.123)	0.96	0.94	0.01 (0.334)
Labor Market Engagement Index	0.67	0.69	-0.01 (0.729)	0.66	0.60	0.05 (0.202)
Environmental Health Index	0.61	0.77	-0.15*** (0)	0.60	0.64	-0.05 (0.383)
School Proficiency Index	0.71	0.67	0.03 (0.232)	0.69	0.66	0.03 (0.416)
Transportation Cost Index	1.24	1.14	0.10*** (0.001)	1.23	1.22	0.02 (0.58)
Observations	35			32		

* $p < 0.10$. ** $p < 0.05$. *** $p < 0.01$.

MTW = Moving to Work. PBV = project-based voucher. TBV = tenant-based voucher.

Notes: All statistics are normalized to the county mean. Raw values for the labor market engagement index, environmental health index, and transportation cost index are national percentile ranks with higher values signifying better outcomes. School proficiency index is percentile-ranked at the state level. This exhibit excludes Delaware State Housing Authority, Lawrence-Douglas County Housing Authority, and Home Forward (Portland, Oregon), which do not have any PBV units. The Housing Authority of the City of San Jose and Housing Authority of the County of Santa Clara household counts in the HUD Office of Public and Indian Housing Information Center data are reported jointly; they are listed here as a single public housing agency.

Sources: Urban Institute analysis of 2016 PIC data, 2012–2016 American Communities Survey 5-year estimates, and HUD AFFH data

Comparisons between PBV households at MTW agencies and at traditional agencies are an important component of this analysis. Exhibit 5 compares the neighborhoods of MTW PBV households to the neighborhoods of PBV households at traditional PHAs. Both sets of PBVs are in neighborhoods with higher poverty relative to the average for their counties. Moreover, at both MTW and comparison PHAs, the average PBV-assisted household lives in a neighborhood with a higher poverty rate than TBV-assisted households and a lower poverty rate than public housing residents.

Both MTW and traditional agencies' PBVs are in neighborhoods that score lower on the AFFH Environmental Health Index than the county average, but after accounting for regional differences, MTW PBVs are in neighborhoods with poorer air quality than PBVs at traditional PHAs. The index ranks census tracts based on potential exposure to harmful toxins as measured in the 2005 National Air Toxins Assessment. At comparison agencies, the typical PBV household lives in a

neighborhood that ranks 23 percent lower than the county as a whole. At MTW agencies, the typical PBV household lives in a neighborhood that ranks 39 percent lower than the national average. The gap in normalized measures of environmental health between MTW and comparison agencies is statistically significant.

Exhibit 5

County-Normalized Measures of Neighborhood Quality for Project-Based Vouchers at Moving to Work and Traditional Public Housing Agencies, 2016

Neighborhood Quality Measures	Means		Difference (p-value)
	MTW PBV	Traditional PBV	MTW PBV – Traditional PBV
Poverty Rate	1.85	1.67	0.17 (0.175)
Percent with Bachelor's Degree	0.83	0.74	0.05 (0.424)
Labor Force Participation	0.96	0.97	0.00 (0.855)
Labor Market Engagement Index	0.67	0.69	-0.02 (0.768)
Environmental Health Index	0.61	0.77	-0.16*** (0.003)
School Proficiency Index	0.71	0.67	-0.01 (0.856)
Transportation Cost Index	1.24	1.14	-0.03 (0.604)
Observations	35	Varies with Measure	

* $p < 0.10$. ** $p < 0.05$. *** $p < 0.01$.

MTW = Moving to Work. PBV = project-based voucher.

Notes: All statistics are normalized to the county mean. Raw values for the labor market engagement index, environmental health index, and transportation cost index are national percentile ranks with higher values signifying better outcomes. School proficiency index is percentile ranked at the state level. Among MTW agencies, this exhibit excludes Delaware State Housing Authority, Lawrence-Douglas County Housing Authority, and Home Forward (Portland, Oregon), who do not have any PBV units. Housing Authority of the City of San Jose and Housing Authority of the County of Santa Clara household counts in Public and Indian Housing Information Center are reported jointly; they are listed here as a single PHA. Poverty Rate, Percent with a Bachelor's Degree, and Labor Force Participation were available for 417 traditional PHAs. Labor Market Engagement was available for only 413 traditional PHAs; Environmental Health Index was available for only 396 traditional PHAs, School Proficiency index was available for 409 traditional PHAs; and Transportation Cost Index was available for 413 traditional PHAs.

Sources: Urban Institute analysis of 2016 PIC data, 2012–2016 American Communities Survey 5-year estimates, and HUD AFFH data

The second part of research question 4 asks about the relationship between PBV usage and race or ethnicity. Exhibit 6 shows differences in the county normalized poverty rate for neighborhoods accessed by Black (non-Hispanic/Latino), Hispanic/Latino, and White (non-Hispanic/Latino) households. With each type of assistance, households headed by a non-Hispanic, White person reach lower-poverty neighborhoods than those with a Black or Hispanic/Latino household head, and differences between housing types are relatively consistent for Black, White, and Hispanic/

Latino-headed households. Results using the other five measures of neighborhood quality can be found in Galvez et al. (forthcoming). In sum, we find that historical patterns of segregation and concentration of minorities in neighborhoods with poor environmental conditions, fewer amenities, and higher poverty rates are unchallenged by the use of PBVs.

Exhibit 6

County-Normalized Neighborhood Poverty Rate for Assisted Households at Moving to Work Agencies by Program and Race/Ethnicity, 2016

	Means			Differences	Observations	Means			Differences	Observations
	PBV	TBV	PBV-TBV			PBV	PH	PBV-PH		
Black (non-Hispanic)	1.88	1.61	0.27***		35	1.92	2.10	-0.18		31
Hispanic	1.81	1.53	0.29***		34	1.81	1.97	-0.16		31
White (non-Hispanic)	1.70	1.43	0.27***		33	1.72	1.80	-0.08		30

* $p < 0.10$. ** $p < 0.05$. *** $p < 0.01$.

MTW = Moving to Work. PBV = project-based voucher. PH = public housing. TBV = tenant-based voucher.

Notes: All statistics are normalized to the county mean. Additional measures appear in appendix B (Galvez et al., forthcoming). This exhibit excludes Delaware State Housing Authority, Lawrence-Douglas County Housing Authority, and Home Forward (Portland, Oregon), who do not have any PBV units. Housing Authority of the City of San Jose and Housing Authority of the County of Santa Clara household counts in Public and Indian Housing Information Center are reported jointly; they are listed here as a single public housing agency.

Sources: Urban Institute analysis of 2016 PIC data and 2012–2016 American Communities Survey 5-year estimates

RAD and LIHTC are also major considerations for us in looking at differences between PBV and TBV. Additional analysis in Galvez et al. (forthcoming) found no statistically significant differences in neighborhood quality measures between RAD and non-RAD PBV units. MTW households in RAD and LIHTC-financed PBV properties live in similar neighborhoods to households in other PBV properties. Among the MTW agencies with LIHTC-financed PBV properties, only two measures showed statistically significant differences: households in LIHTC-financed PBV properties live in neighborhoods with somewhat better access to transportation and somewhat worse air quality. Otherwise, PBVs in LIHTC-financed properties were in similar neighborhoods as other PBV households with regards to poverty, educational attainment, labor force participation, and school proficiency.

Case Studies of Three Moving to Work Agencies' Project-Based Voucher Use

In this section, we summarize findings from our review of three PHAs' PBV programs. The three agencies included are Boulder Housing Partners, Cambridge Housing Authority, and the Seattle Housing Authority. We first discuss common themes that emerged from the interviews with the three agencies about how and why they use PBV assistance. We then present summaries of each agency's PBV activities along with additional detail on each agency.

Common Perspectives on Project-Based Voucher Use

Several common themes emerged about how and why the three agencies use PBV assistance.

The three PHAs maximize their MTW flexibilities to pursue MTW housing choice and cost-effectiveness objectives. All three agencies included in our case studies use at least two of the five

main PBV flexibilities available to MTW agencies (summarized in the background section above), combined with flexibilities available for HCV program administration generally. In MTW plans and reports, all three agencies tie their PBV activities and waivers to the housing choice and cost-effectiveness objectives—although each agency noted in interviews that PBVs can also indirectly impact the MTW self-sufficiency objective.

Specifically, all three agencies waive the cap on the share of HCV budget authority that may be applied to PBVs and the cap on the number of PBV units that may be in a single property. Among the three agencies, the share of budget authority applied to PBVs in 2016 was the lowest for Seattle (31 percent) and highest for Cambridge (67 percent). Each of the agencies subsidizes properties that are 100 percent PBVs. Each of the agencies also applies additional HCV program flexibilities to their PBVs, and each retains partial or full ownership in at least one property with PBVs.

Agencies use PBVs to facilitate partnerships. Each of the three PHAs described PBVs as facilitating a variety of partnerships with community stakeholders to further local affordable housing priorities or initiatives. For example, this included a longstanding partnership between the Seattle Housing Authority and the city of Seattle to use PBVs to augment local Housing Tax Levy funds to address homelessness. The ability to pursue common goals with local partners and be responsive to local housing needs was noted as a key motivation for all three agencies' PBV use.

PBVs allow the PHAs to be more effective in tight housing markets. Each of the three agencies is in expensive housing markets with low vacancy rates. Agency staff noted advantages to PBVs compared with TBVs in such market contexts. For example, all three noted that PBVs provide opportunities to preserve or secure affordable units in areas with high or rapidly rising rents, whereas TBV families have difficulty finding voucher-affordable housing or landlords that accept vouchers.

Staff from each of the agencies also said that year-to-year increases in housing assistance payment costs could be more predictable for PBVs compared with TBVs in areas where rents are rising quickly. Whereas individual landlords may raise rents substantially at the end of a lease period, PBV HAPs and annual increases are established in PBV contracts. This allows agencies to build increases in their longer-term financial planning.

PBVs offer opportunities for administrative efficiency. Agency staff said the MTW PBV flexibilities offered opportunities for administrative efficiencies—and subsequent cost offsets for the agencies—that TBVs do not. For example, Boulder Housing Partners' staff discussed site-based waiting lists administered by individual property owners and managers as allowing the PHA to free up staff time for other tasks, in addition to helping the agency efficiently connect households to suitable units and properties. The Seattle Housing Authority staff also noted that conducting inspections at properties with multiple PBV-assisted units is more efficient than inspecting geographically dispersed units or units that require interacting and coordinating with multiple owners or managers. In addition, by allowing owners to conduct their own turnover inspections for mid-year vacancies, the Seattle Housing Authority reduced the number of annual staff hours spent conducting inspections.

Maintaining a balance of TBVs and PBVs. Each of the PHAs discussed the need to maintain a portfolio of TBVs, as well as PBVs, and the limitations on PBV use. None expected to transition to 100 percent PBVs, and all acknowledged the importance of maintaining the residential mobility opportunities that TBVs offer. Agency leadership said they periodically discuss the appropriate balance of HCV use and whether to expand PBVs.

Project-Based Vouchers and Neighborhood Location

None of the three agencies explicitly use PBVs to target low-poverty or high-opportunity neighborhoods. Each of the agencies, however, tied their PBV activities to a broad definition of housing choice—emphasizing that PBVs increase local affordable housing options for low-income people citywide and the benefits associated with their current PBV locations.

For example, the Cambridge Housing Authority and Boulder Housing Partners described their jurisdictions as generally wealthy and opportunity-rich. The Cambridge Housing Authority staff viewed the city as a whole as a resource-rich environment that is difficult for TBV holders to access. This characterization of their PBV efforts as generally offering access to opportunity areas is reflected in the MTW activities reported to HUD. Boulder Housing Partners similarly highlighted the city's relatively low-poverty rates as a reason for not explicitly prioritizing low-poverty neighborhood locations.

The Seattle Housing Authority staff noted the city's downtown area, where many of their PBV units are located, was identified as an opportunity area by a Kirwan Institute and Puget Sound Regional Council analysis—in part because of the proximity to public transportation and social services.^{20, 21} For formerly homeless PBV residents, who account for most of their PBV occupants, access to these resources can be essential to helping them be successful.

Boulder Housing Partners: Public Housing Conversion and Local Partnerships

“They’re bringing their services and we’re bringing the housing, so it’s a match made in heaven.”

—*Boulder Housing Partners*

Since receiving MTW designation in 2011, the Boulder Housing Partners has focused their PBV efforts on converting their public housing stock to PBVs and transitioning fully to HCV assistance. They also have partnered with local housing and service providers to pursue a comprehensive place-based education initiative, and in their 2015 MTW plan, they committed to contributing 2,000 new affordable units to Boulder's permanently affordable inventory by 2025.

Staff said in interviews that MTW PBV flexibilities were a motivation for pursuing MTW status. MTW status generally, and MTW PBV flexibilities specifically, are central to pursuing the agency's

²⁰ For more information, see the Puget Sound Regional Council's “Opportunity Mapping”: <https://www.psrc.org/opportunity-mapping>.

²¹ Seattle Housing Authority is also piloting a neighborhood mobility program using TBVs to support moves to opportunity-rich neighborhoods. For more information, see: <https://www.seattlehousing.org/creating-moves-to-opportunity-seattle-king-county-pilot-project-fact-sheet>.

goals. Waivers to the PBV budget authority and units per property caps were included in the agency's first MTW Annual Plan after receiving MTW designation (BHP Annual Plan, 2012). The Boulder Housing Partners formally ties its PBV use to the housing choice and cost-effectiveness MTW statutory objectives, although staff said in interviews that their PBV program also addresses family self-sufficiency. In 2018, the agency consolidated MTW activities enacted in previous years into a single PBV program activity. In addition to waiving the PBV caps, the activity allows Boulder Housing Partners to project-base 100 percent of units in a single project and to use site-based waitlists. The activity also modifies several administrative policies for their HCV program, including local rent reasonableness tests, rent limits, Housing Quality Standards inspections, and income requirements.

Staff described how PBVs and the combination of PBV flexibilities help the agency impact the MTW statutory objectives. For example, site-based waiting lists can help the agency more efficiently place households into properties and units that meet their needs and offer more housing choices. Staff said that converting units to PBVs as opposed to TBVs also allowed Boulder Housing Partners to maintain the same demographic mix in their properties as in their traditional public housing. The Bringing School Home initiative, located at five former public housing communities that were converted to 100 percent PBVs, is intended to help close gaps in educational achievement for low-income children and support long-term economic self-sufficiency.

Agency staff identified three specific programmatic efforts, which they believe have been supported by MTW PBV flexibilities.

Partnerships. Strong partnerships with local service providers are central to Boulder Housing Partner's organizational goals. Staff noted that the re-naming of the organization in 2001 from the Housing Authority of the City of Boulder to Boulder Housing Partners reflects a longstanding emphasis on service partnerships that predates their MTW status. These partnerships do not usually come with additional service dollars attached; rather, staff emphasized that both the Boulder Housing Partners and their affiliates see the value in connecting families already receiving services to Boulder Housing Partners-assisted units. For example, Boulder Housing Partners joins with the Boulder Shelter for the Homeless, which provides case management for homeless individuals and families and helps them transition into PBV-assisted housing.

Project Renovate. Completed in 2017, Project Renovate converted 279 public housing units in six properties to PBV units using RAD and Section 18 Demolition and Disposition. Boulder Housing Partners converted units to PBVs instead of PBRA through RAD to retain the use of MTW PBV flexibility for these units. Staff said that a goal for the conversions was to retain the same households, demographic mix, and level of affordability for the converted properties as in their original public housing portfolio. The housing authority has converted 135 units to PBVs through RAD, amounting to about 33 percent of their PBV-assisted units. Two additional PBV public housing property conversions have been completed through the Section 18 Demolition and Disposition program (2018 annual report).

Bringing School Home. Bringing School Home is a place-based initiative currently operating in five former public housing properties that were converted to 100 percent PBVs. Local partners

manage the PBV communities and provide a variety of on-site services for children up to 6 years old through a variety of educational and enrichment supports for them and their families. The Emergency Family Assistance Association manages the waitlist for these properties and is responsible for the screening and admission. An example of services offered to residents includes the “I Have a Dream” Foundation’s programming. The program seeks to reduce the gap in educational outcomes between low-income students and their peers by maximizing the amount of time children spend in educationally enriching activities.²²

Cambridge Housing Authority: Preserving Affordable Housing with Project-Based Vouchers

“The Project-Based Voucher (PBV) Program is considered a community resource, both to support and preserve existing housing, and to expand affordable housing development in Cambridge.”

—*Administrative Plan for the Federal HCV Program*
Cambridge Housing Authority (2013)

Rapidly rising rents, and extreme pressure on the affordable housing stock in and around the city of Cambridge, provides the motivating context for the PHA’s MTW and PBV program priorities. In 2014, only 54 units of housing were available to every 100 extremely low-income households in Middlesex County; 35 of these units were HUD-subsidized (Poethig et al., 2017). Approximately 30 percent of Cambridge’s population is students, which places additional demands on the lower end of the rental housing market.²³ Rents have been rising rapidly in the Cambridge area since 1994 when rent control ended in the state of Massachusetts.

The housing authority’s MTW and PBV programs center on creating and preserving affordable units in Cambridge. In interviews, staff emphasized that TBVs are difficult to use locally, with 47 percent of TBVs porting out of the jurisdiction. TBV holders who remain in Cambridge may face annual rent increases beyond the TBV voucher payment standard—set at 126 percent of fair market rent—potentially triggering a move, higher HAPs, or additional rental costs and higher rent burdens for assisted households.

Agency staff identified three specific programmatic efforts that they believe are facilitated by MTW PBV flexibilities.

The Expiring-Use Preservation Program. About one-half of the Cambridge Housing Authority PBVs—about 1,800 vouchers in 18 properties—were issued through the Expiring-Use Preservation Program, which focuses on preserving units in and around Cambridge. Through this program, the Cambridge Housing Authority identifies units in the private rental market with an existing subsidy that are nearing their expiration date (for example, HUD legacy programs like the Rent Supplement program and Rental Assistance Payment). Upon expiration of these subsidies, eligible residents may

²² For more information about the Bringing School Home program, see: <https://boulderhousing.org/bringing-school-home>.

²³ “Demographics and Statistics FAQ.” Cambridge Development Department, accessed February 2019, <https://www.cambridgema.gov/CDD/factsandmaps/demographicfaq>.

receive an Enhanced Voucher,²⁴ which allows them to remain in their unit; however, if the resident leaves their original unit, the Enhanced Voucher converts to a mobile voucher, and the original unit becomes unsubsidized and likely converted to a market-rate unit. Through the Expiring-Use Preservation Program and their MTW authority, the Cambridge Housing Authority is able to work with the owner to preserve the tenancies of the existing residents in addition to preserving the long-term affordability of these units.

Public housing conversion through RAD. Just under 30 percent of the agency's PBV-assisted units are in former public housing properties converted through RAD. The Cambridge Housing Authority converted units to PBVs rather than PBRA to retain MTW flexibilities for rent simplification and to retain voucher administrative fees, providing additional cash flow to leverage debt for capital improvements. Staff asserted that it was a priority to retain the same assisted households through the conversion and avoid disrupting their experience with the housing authority. According to agency staff, few residents, if any, have taken advantage of Choice Mobility²⁵ TBVs because of the challenges of finding housing with a mobile voucher in Cambridge.

Partnerships. The Cambridge Housing Authority has several partnerships with service providers and housing developers that incorporate PBV assistance to develop or preserve affordable units. Many of these partners provide services on-site in PBV-assisted properties. For example, the Cambridge Housing Authority partners with Just-A-Start to place their PBV-assisted units. As a community development corporation, Just-A-Start provides resident services in all their affordable rental developments, including supportive services and education programs.²⁶ The Cambridge Housing Authority noted that their development partners can access properties or neighborhoods that the housing authority may not be able to access alone. They also stated that most of their partnerships are long-standing, formalized through Memoranda of Understanding, and were formed when organizations approached the PHA with collaboration ideas.

Seattle Housing Authority: Using Project-Based Vouchers to Serve People Exiting Homelessness

“Our primary interest in the project-based voucher has been in the population that it serves and the services that come with it.”

—*Seattle Housing Authority*

Since the early 2000s, the Seattle Housing Authority has partnered closely with the city, county, and local service providers to address homelessness and support service-enriched housing for high-need populations. Most of the Seattle Housing Authority's 3,600 PBVs are connected to these efforts, with a small share going to replacement vouchers in their HOPE VI communities. The

²⁴ For more information about HUD's Enhanced Vouchers, see: https://www.hud.gov/sites/documents/ENHANCED_VOUCERS_ENG.PDF.

²⁵ Residents living in RAD-converted units have a right to choice mobility, which is similar to HUD's Family Right to Move requirement. All properties that convert assistance must provide residents the choice of moving with continuing tenant-based rental assistance using an HCV within an established time after conversion, which is 1 year for PBVs. Unlike the Family Right to Move Requirement, MTW PHAs are not able to waive or modify this provision.

²⁶ For more information on Just-A-Start, see: <https://www.justastart.org/>.

Seattle Housing Authority staff stated that to date, their use of PBVs has, in large part, been guided by community priorities identified by local partners.

A tradeoff discussed by the Seattle Housing Authority staff of the focus on homeless and high-need households is that the Seattle Housing Authority's PBVs disproportionately house White, single adult men compared with their TBV program. The PBV population mix is driven by priorities set through the city's Housing Tax Levy efforts and the county's 10-Year Plan to End Homelessness, and not by explicit Seattle Housing Authority targets. Although staff said that single adults can inherently carry some cost efficiencies because they tend to live in studios that have lower HAP costs than larger units, it has also meant serving fewer families than might be expected through the TBV program. Unlike the PBV population, staff said, roughly half of the TBV waiting list tends to be families with children.

Agency staff identified two main programmatic efforts as facilitated by MTW PBV flexibilities.

Local partnerships to end homelessness. Two main partnerships were discussed as driving the Seattle Housing Authority PBV use: the Seattle Housing Tax Levy and the King County 10-Year Plan to End Homelessness.²⁷ The Housing Tax Levy raises funds to support affordable housing creation and preservation. The first levy was passed in 1986, and Seattle residents vote every 7 years to provide funding to create and preserve affordable housing. The Seattle Housing Authority leadership said that for each levy process, they determine whether to participate and at what scale. The Seattle Housing Authority has contributed PBVs to each of the levies passed since they received MTW status—in 2002, 2009, and 2016—committing 500, 500, and 300 new PBVs, respectively. In total, roughly one-half of the Seattle Housing Authority PBVs are units connected to the levy.

Staff said that prior to the Tax Levy collaboration and through approximately 2009, additional ad hoc partnerships were formed that account for the balance of the Seattle Housing Authority PBV units. Many centered on the county's Plan to End Homelessness and efforts to braid housing assistance with service dollars from the county or other sources to serve high-need populations.

Cost-effectiveness through PBVs. The Seattle Housing Authority has made several efforts to pursue efficiencies through its PBV program specifically and HCV program generally. Staff highlighted two PBV flexibilities as particularly useful to sustaining service-enriched housing: waiving the PBV exit voucher requirements (or the "Family Right to Move") and site-based waiting lists. Waiving exit vouchers was described as allowing continuity and predictability for service partners and removing pressure from the TBV waitlist to absorb households exiting PBV units. Staff said that site-based waiting lists allowed high-need populations to be connected to properties that offered appropriate services. Additionally, the Seattle Housing Authority has implemented combined program management, which enables the Seattle Housing Authority to streamline management and policies for PBV and public housing units that are co-located at the same property and to ensure that their residents do not see a difference in their services or program management, no matter what kind of assistance they receive.

²⁷ For more information on the Seattle Housing Levy, see: <https://www.seattle.gov/housing/levy>. For more information on the King County 10-year Plan to End Homelessness, see: <http://www.cehkc.org/plan.html>.

Discussion

This study documents various aspects of PBV use for MTW agencies and a group of comparably sized traditional agencies using administrative data and case studies of three MTW agencies with large PBV portfolios.

PBV use is more common among MTW agencies than among traditional PHAs, but extensive PBV use is not the norm. Most MTW agencies used PBVs to some extent as of 2016 and reported activities requiring MTW PBV flexibilities. Yet, only nine agencies exceeded the 20-percent budget authority cap on PBV use in 2016, and only four of those agencies used PBVs for more than 25 percent of the assisted housing they provided. More MTW agencies used PBVs and their flexibilities sparingly. Even among the three case study agencies with extensive PBV use, operating in markets where TBVs are challenging to use, staff discussed the importance of maintaining a portfolio of TBVs and the residential mobility opportunities they offer.

Local housing markets play an important role in PBV use and agency decisions, which was evident in both the quantitative and qualitative findings. Across MTW agencies, PBV use increased more in the Northeast than in the South and Midwest. Furthermore, our analysis of MTW and traditional PHAs shows that agencies in areas with higher rents increased their PBV use more than agencies in more affordable markets. Staff at the three case study agencies stated that PBV costs are more predictable than TBV costs when rents are rising quickly. All three agencies discussed the challenges TBV holders face finding private market housing citywide or in specific submarkets as motivating their PBV use.

Our results also show a relationship between distressed public housing and PBV use. MTW and traditional agencies with lower-quality public housing in 2008 (measured as PASS scores) were more likely to increase their PBV use by the end of our study period (2016). The MTW agencies were more likely than the traditional agencies to use RAD to convert public housing and convert to PBVs. This may reflect MTW agencies' ability to use funding or other flexibilities to navigate the RAD conversion process, and that MTW agencies can retain their funding and other flexibilities for converted PBV units (but not for PBRA).

We find no evidence that PBVs are used as a tool to improve access to low-poverty or opportunity-rich neighborhoods by MTW agencies or our sample of traditional PHAs. For both sets of agencies, PBVs are in more distressed neighborhoods compared with TBVs and tend to be in areas that more closely resemble public housing neighborhoods. Also, on average, both MTW and traditional PHAs' PBV-assisted households live in more distressed neighborhoods than the typical neighborhood in their counties.

Results were similar across neighborhood quality measures, with two exceptions. MTW PBVs were in neighborhoods with better access to affordable transportation compared with the average for their counties, most likely because MTW agencies tend to serve dense central cities with better public transportation compared with other parts of their counties. Moreover, MTW agencies' PBVs are in neighborhoods with higher educational attainment than TBVs or public housing.

We did not find any differences in location patterns by race or ethnicity for PBVs compared with other assistance programs. As is the case for the TBV program, non-White PBV-assisted households tend to live in higher-poverty, more distressed neighborhoods than White PBV-assisted households. We found that MTW agencies in more racially segregated areas are more likely to have PBV units in higher-poverty neighborhoods. Notably, PBV locations appeared more sensitive to racial segregation than TBVs in the same jurisdictions. It may be that, in highly segregated cities, developing PBV properties outside of high-poverty neighborhoods is more difficult than renting in those same neighborhoods with a TBV.

The case study agencies, although not representative of all MTW agencies, did not approach PBVs as a tool to create housing in opportunity-rich neighborhoods. The agencies' primary PBV goals were to preserve and expand housing opportunities more broadly and to improve cost efficiency—and PBV use tended to be tied to specific local priorities, partnerships, target populations, and market considerations. The agencies discussed their PBV use as consistent with neighborhood choice goals in that PBVs were in areas that likely offered tangible benefits to assisted households. The three case studies underscore the diverse and creative ways that MTW agencies may use PBVs to pursue the MTW program's statutory objectives and the importance of local contexts and priorities in agency decisionmaking.

Limitations

A significant limitation of this study is that it does not examine the extent to which PBVs are combined with supportive services or used to house high-need households. MTW agencies have unique opportunities to provide supportive services by making creative use of funding or policy flexibilities—and staff from the case study agencies discussed tying supportive services to PBV properties for veterans, people experiencing homelessness, and others. HUD also encourages traditional PHAs to use PBVs to provide supportive services and serve “hard to house” families. No data source documents whether PBVs house high-need families or are linked to services. MTW annual plans and reports provide some relevant information, but the scale or nature of services cannot be determined consistently.

Our analysis of the relationships between the PBV and LIHTC programs was also limited by available data. Administrative data do not identify vouchers used in LIHTC properties, and issues with data quality, changes in street addresses after redevelopment, and differences in coordinate precision and formats prevented exact location matching between PIC and the National Housing Preservation Database. We estimate the intersection of these programs for MTW agencies based on addresses, but these estimates are sensitive to assumptions about property and block sizes and could be improved by adjusting for local contexts.

The small number of MTW agencies itself was a limiting factor for cross-agency analysis of PBV use or locations. We include comparison traditional PHAs in regression analyses to increase our sample sizes and our ability to detect statistical relationships. As a result, the extent to which the estimated relationships between motivating factors and PBV use are representative of MTW agencies, specifically, could not be determined. Similarly, we include case studies of just three MTW agencies that are not typical of the average PHA because they are the highest PBV users among all PHAs

nationally and in some of the nation's most competitive rental markets. Their insights are useful to understand the benefits of PBVs in tight markets and ways that PBVs can be used to facilitate partnerships or increase administrative efficiencies—but they tell us little about PBV use in weaker markets or decisionmaking among agencies that do not use PBVs.

Policy Implications and Future Research

Our findings suggest some cause for concern about PBV locations and PBV-assisted households' access to low-poverty, opportunity-rich neighborhoods. More research is needed to understand ways to improve PBV neighborhood locations, including the mechanisms driving PBV location options and MTW agency decisionmaking. For example, more qualitative research with MTW and traditional agencies could shed light on how agencies select PBV properties and identify opportunities for HUD to encourage improved locations. More work is also needed to examine the relationship between PBV locations and racial segregation—for example, to understand whether local opposition to affordable housing development contributes to PBVs' concentration in high-poverty areas. Finally, research is needed to fully document how often MTW agencies waive or revise the PBV Family Right to Move requirement, the agencies' reasons for doing so, and ways to make it more feasible for agencies to implement it in the way HUD intends.

Second, the case studies identified examples of unique approaches to PBV use and productive local partnerships from three high-capacity agencies, but a rigorous investigation of promising MTW agency activities was not possible. More information about innovative practices and partnerships from a diversity of agencies could help identify replicable models. Future case studies or qualitative work should include a range of PHA sizes, local market characteristics, and agencies with different levels of PBV use to understand the challenges and opportunities that PBVs present to pursue MTW's objectives.

Third, our analyses begin to document the relationships between the HCV program and LIHTC properties, but more work is needed to fully understand the extent to which the HCV and LIHTC programs are mutually dependent. A more precise estimate of PBV and TBV co-location in LIHTC properties at both MTW and traditional PHAs would shed light on the role that LIHTC properties play in the HCV program.

Finally, future work should examine the extent to which MTW agencies and traditional PHAs combine PBVs with supportive services or use PBVs to support high-need households. HUD should consider ways to strengthen data and reporting from both MTW and traditional agencies, to support research on the availability of supportive services and examine outcomes for households with access to services.

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