

PHARE Progress and Impact Report

Data Dictionary

Program Overview

The Pennsylvania Housing Affordability and Rehabilitation Enhancement (PHARE) Fund was established in 2010 to expand housing opportunities and services for Pennsylvania families. The PHARE program has become an essential resource for communities across the Commonwealth, supporting a range of activities from creating new affordable senior housing to providing utility assistance to struggling families.

PHARE was established to create a source of dedicated funding for local community projects. Alongside federal programs like the Community Development Block Grant (CDBG) and local funding from philanthropy and city or county resources, PHARE provides an essential resource that allows communities to expand their existing programs and pilot innovative approaches intended to be uniquely responsive to their community's housing challenges.

The program is administered through PHFA, which makes awards annually through a competitive process. Eligible grantees include local government agencies, non-profits, redevelopment and housing authorities, and economic or community development agencies.

A Note on PHARE Data

The data included in this report is pulled from the PHARE application and reporting database as well as from ongoing compliance monitoring. Projects are included in the report if they are approved for PHARE funding through the standard PHARE Application process. However, certain projects may ultimately elect not to draw down awarded funds or may return a partial or full disbursement. These projects remain included in the report and are identified accordingly in the "Grantee Status" field.

LIHTC Projects that receive funding through PHARE follow a slightly different timeline than standard PHARE projects. These projects are often awarded funding contingent on their allocation of 4% of 9% tax credits. As a result, LIHTC projects are incorporated into the PHARE Progress and Impact Report only after they have officially received a tax credit allocation. In practice this means that a LIHTC project that applied for PHARE funds in 2024 may not appear in the Report until 2025 when the project officially receives an allocation of

tax credits. Additionally, a LIHTC project receiving PHARE funding is considered “Closed” by the PHARE program only after construction is complete and all units are fully occupied.

Report Updates and Timeline

The PHARE Progress and Impact Report will be updated and published on a semi-annual basis, corresponding to PHARE grantee Semi-Annual reporting deadlines. All updates to the report reflect the most recent Semi-Annual or Closing Report submissions. For example, the PHARE Progress and Impact Report published in October, would include the data from the July PHARE Semi-Annual Reports.

Report Fields

Application Year:

The calendar year in which the PHARE application was submitted. This may differ from the year of PHARE award. As a standard practice, applicants submit PHARE applications in the year prior to receiving an award. For example, a project that applied in the 2019 application round may be approved and awarded in 2020, with a grant period extending into 2021 depending on the timing of disbursement.

Project Name:

The name of the PHARE project as submitted by the grantee at the time of application. An organization may request funding for a similar program or initiative across multiple years; however, each funding request is assigned a distinct project name and a separate entry within the Semi-Annual PHARE Report.

Grantee:

The name of the grantee as provided at the time of application. Due to organizational name changes or submission errors, multiple variations or spellings of a grantee's name may appear in historical records. When searching for a specific grantee, users should consider prior names and common misspellings.

Grant Status:

The funding and completion status of the PHARE grant, categorized as follows:

- **CLOSED:** The grant has been fully expended, the project has been completed, and a Closeout report has been submitted. For construction awards, including LIHTC projects, a grant is considered "CLOSED" when the project has been completed and all units are occupied.
- **OPEN:** The grant has not been fully expended and the project remains ongoing.
- **Awarded, Full Return of Funds:** The grant was approved, included in the "PHARE Reservation of Funds", and disbursed; however, the grantee returned the full amount and did not complete any proposed project activities.
 - "Marcellus Shale Award Amount", "Realty Transfer Tax Award Amount", and "Total PHARE Award Amount" represent the funding amount approved, disbursed, and returned.
- **Awarded, Partial Return of Funds:** The grant was approved, included in the "PHARE Reservation of Funds", and disbursed; however, the grantee returned a portion of the funds, typically due to a change in project scope.

- o “Marcellus Shale Award Amount”, “Realty Transfer Tax Award Amount”, and “Total PHARE Award Amount” represent the funding amount approved and disbursed.
 - o “Amount Spent to Date” and “% Spent to Date” represent that amount of the grant utilized by the grantee before returning the rest of their funding.
- **Awarded, Funds NOT Accepted:** The grant was approved and included in the “PHARE Reservation of Funds”, but the funds were never disbursed to the grantee.
 - o “Marcellus Shale Award Amount”, “Realty Transfer Tax Award Amount”, and “Total PHARE Award Amount” represent the funding amount approved but never disbursed.

Funding Priority

The Funding Priority under which the original application was submitted. Not all Funding Priorities were available during each application cycle; Funding Priorities were first requested as part of the PHARE application in 2018. All projects with applications prior to 2018 were assigned a Funding Priority based on their project description. A brief description of each Funding Priority, as outlined in the PHARE Plan, is provided below:

- **9% Tax Credit:** Projects that will complete an application package for Competitive 9% Tax Credits.
- **4% Tax Credit:** Projects that will complete an application package for 4% Tax Credits with Tax-Exempt Bonds.
- **Health for Housing Investments (HHI):** Targeted partnerships with healthcare providers to support and monitor the success of interventions related to housing determinants of health. Solutions to create new healthcare referral mechanisms with preference for programs that track and monitor community impacts to show structural system changes that build equity.
- **Homelessness Prevention:** Address ongoing needs for individuals and families at risk for homelessness, including (but not limited to) rapid re-housing, rent/utility/transportation assistance, legal assistance, landlord outreach, case management, and short-term emergency shelter care.
- **Homeownership:** Development of additional affordable for-sale housing units, also to include support for down payment and closing cost assistance programs for first-time homebuyers and vulnerable/underrepresented communities.
- **Housing Counseling and Financial Education:** Activities providing various types of housing counseling, including pre-and-post purchase, financial education, foreclosure prevention and other forms of direct client counseling to assist homeowners or renters.

- **Innovative Housing Solutions:** Piloting unique and creative approaches to addressing unmet housing needs and historic disparities in housing.
- **Preservation/Rehabilitation/Renewal:** Rehabilitation of existing housing stock, demolition of blighted, at-risk housing, and renewal of brownfields or vacant land for green space.
- **Rental Housing Creation:** Development of new, affordable rental units. This may include costs for acquisition, pre-development, construction and/or significant rehabilitation, and demolition where the development of affordable housing is the end goal.

County

The geographic scope of the project as reported by the grantee at the time of application. Geographic scope is categorized as follows:

- **Single County:** the project serves one Pennsylvania county.
- **Dual County:** the project serves two Pennsylvania counties, listed separately and separated by a forward slash.
- **Regional:** the project serves between three (3) and forty (40) Pennsylvania counties.
- **Statewide:** the project serves more than forty (40) Pennsylvania counties.

Marcellus Shale Award Amount

The amount of Marcellus Shale (MS) funds approved for award to the PHARE grantee for the project. Not all Pennsylvania counties are eligible to receive MS funds; a complete list of eligible counties is available at <https://www.phfa.org/legislation/act105.aspx>.

Realty Transfer Tax Award Amount

The amount of Realty Transfer Tax (RTT) funds approved for award to the PHARE grantee for the project. All Pennsylvania counties are eligible to receive RTT funds.

Total PHARE Award Amount

The total amount of PHARE funds approved for award to the grantee for the project, calculated as the sum of all MS and RTT funding disbursements.

Amount Spent to Date

The total amount of PHARE grant funds disbursed and expended from the initiation of the grant through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

Percentage Spent to Date

The calculated percentage of total PHARE grant funds that have been disbursed from the initiation of the grant through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

Amounted Committed to Households Below 50% AMI

The total amount of utilized PHARE funds expended to support households with incomes at or below 50 percent of the area median income (AMI), measured from the initiation of the grant through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report. In accordance with the PHARE Plan, a minimum of 30 percent of each PHARE grant must benefit households at or below 50 percent of AMI.

Rental Units Created

The total number of new rental housing units completed from the project's grant initiation date through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

New Homeownership Units Created

The total number of new homeownership units completed from the project's grant initiation date through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

Rental Units Preserved/Rehabbed/Renovated

The total number of existing rental housing units that have been rehabbed, renovated, and/or preserved from the project's grant initiation date through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

Homes Preserved/Rehabbed/Renovated

The total number of existing homeownership units that have been rehabbed, renovated, and/or preserved from the project's grant initiation date through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

Households Assisted

The total number of households assisted or receiving serves from the project's grant initiation date through the end of the most recent reporting period, as documented in the latest Semi-Annual Report or Closeout Report.

Report Date

The date of the most recently submitted PHARE Semi-Annual Report or Closeout Report, from which data points on project impact are derived (e.g., Amount/Percentage Spent to

Date, Rental Units Created, New Homeownership Units Created, Rental Units Preserved/Rehabbed/Renovated, etc.)

Compliance Status

The compliance status of the PHARE project. Compliance status is categorized as follows:

- **Closed, Compliant:** Project has been completed, and grantee has successfully submitted their required PHARE Closeout Report.
- **Closed, Non-Compliant:** Project may have never accepted funds, returned disbursed funds, or been closed by PHARE administrators due to non-completion.
- **Open, Compliant:** Project is ongoing, and grantee has successfully submitted their most recent required PHARE Semi-Annual Report
- **Open, Non-Compliant:** Project is ongoing, and grantee is missing one (or more) required PHARE Semi-Annual Report(s). Please note, some newly awarded grants may show as “Open, Non-Compliant” even though they have not yet reached the end of their first required reporting period.