



AGENDA OF THE GREEN BAY HOUSING AUTHORITY

THURSDAY, MAY 18, 2023, 10:30 AM
City Hall, Room 604 - The Harry Maier Room.
Virtual attendance is also available via Zoom.

A. Zoom Meeting Information.

1. This item contains Zoom information, instructions, and a link to the Virtual Comment Form.

B. Roll Call.

1. William VandeCastle - Chair, Terri Refsguard Vice-Chair, Sandra Popp, Erin Edwards and Stephen Srubas

C. Approval of the Agenda.

1. Approval of the agenda for the May 18, 2023, meeting of the Green Bay Housing Authority.

D. Approval of Minutes.

1. Approval of the minutes from the February 16, 2023, meeting of the Green Bay Housing Authority.

E. Public Hearings.

1. Public Hearing regarding the Capital Funding Projects for the Green Bay Housing Authority.
2. Public hearing regarding the amendment of the Green Bay Housing Authority's 5 year plan.

F. Regular Business.

1. Consideration with possible action on approval of the Annual Civil Rights Certification, Resolution 2023-02.
2. Consideration with possible action on approval of GBHA operating budget and Budget Resolution 2023-03, for Fiscal Year Beginning July 1, 2023.
3. Consideration with possible action on Passbook Savings Rate.

4. Consideration with possible action to approve Resolution 2023-04 authorizing submission of HUD RAD / Section 18 blend program application.
5. Consideration with possible action to award the Mason Manor quarterly bed bug inspection contract to Sandberg K9 Solutions.

G. Informational.

1. GBHA Bills.
2. GBHA Financial Report.
3. Langan Report.
4. Director's Report.
5. Occupancy Report.
6. Date of the next meeting: June 15, 2023.

H. Adjournment.

- 1) THIS MEETING IS RECORDED: THE VIDEO OF THIS MEETING AND MINUTES ARE AVAILABLE ONLINE AT www.greenbaywi.gov
- 2) ACCESSIBILITY: Any person wishing to attend who requires special accommodation because of a disability, should contact the City Safety Manager at 920-448-3125 at least 48 hours before the scheduled meeting time so that arrangements can be made.
- 3) QUORUM: Please take notice that a majority or quorum of the Common Council will attend this Green Bay Housing Authority meeting and will constitute a meeting of the Common Council for purposes of discussion and information gathering relative to this agenda.
- 4) REPRESENTATION: The party requesting the communication, or their representative, should be present at this meeting.

Virtual Meeting Instructions



Green Bay Housing Authority Zoom Meeting Information

Join Zoom Meeting

<https://us02web.zoom.us/j/81434999289?pwd=N0dIMGxWSS85SGswK2lZeGhZZUN0UT09>

Meeting ID: 814 3499 9289

Passcode: 483400

One tap mobile

+13017158592,,81434999289# US (Washington DC)

+13126266799,,81434999289# US (Chicago)

Dial by your location

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 646 876 9923 US (New York)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 408 638 0968 US (San Jose)

Meeting ID: 814 3499 9289

Find your local number: <https://us02web.zoom.us/j/81434999289?pwd=N0dIMGxWSS85SGswK2lZeGhZZUN0UT09>

Public Comments

If you wish to speak at this public meeting or leave a comment, please fill out the online [Comment Form](#) prior to the meeting.

Additional Information

1. Wisconsin Open Meetings Law still applies
 - a. Persons interested in speaking to an item must state their name and address for the minutes.
 - b. Committee/Commission/Board members will still follow *Roberts Rules of Order Newly Revised 12th edition*.
2. Please log into the Zoom meeting at least 10 minutes before the meeting begins to ensure a proper connection and that your technology is working.
 - a. If you are a Board Member, please log into [CivicClerk](#) with a computer, laptop, or tablet device.
3. Once you are in the meeting please mute yourself.
 - a. You may unmute yourself when you are called upon to speak.
4. Waiting room
 - a. When you call in or connect via web or Zoom app, you will be placed in a “waiting room.”
 - b. The meeting host will then admit you to the meeting, and mute you upon entrance (you will still be able to hear and or otherwise observe the meeting).
5. Registering
 - a. The host may ask you to register for the meeting. A registration link will be sent to you along with the invite. You'll receive another email confirming that you're registered for the meeting.
 - b. If you're using a phone, your registration will be tied to an email.
6. Raising your hand
 - a. Committee/Commission/Board members—you can either use CivicClerk and request to speak or you can also utilize the “raise your hand” tool in the Zoom platform (you'd need to use a computer or tablet) to let the host know you would like to speak. You can also un-mute yourself and start speaking.
 - b. Persons with items on the agenda or other interested parties—you can also utilize the “raise your hand” tool on the Zoom platform via computer or mobile device. You will be allowed to speak once the committee, commission, or board has moved to “open the floor for interested parties to speak.” Once discussion on your agenda item has concluded, the host will mute you, unless the committee opens the floor again.
7. What devices should I use?
 - a. Smart phone (please see more detailed instructions on page 3)
 - b. Land line
 - c. Tablet—in advance of the meeting, please download the Zoom Meeting app by using either the Apple Store or the Play Store. You will be asked to input your name, to identify you for the meeting.
 - d. Computer—you can access the meeting through a web browser by clicking on the meeting link, or through the Zoom Meeting app. If using the app, please download it in advance of the meeting. You will be asked to input your name, to identify yourself for the meeting.
 - e. For tablet and computer users--if you download the app you may be asked to verify your email.

8. Zoom etiquette
 - a. Muting yourself when you're not speaking will prevent your background noise from interfering with others' ability to listen to and participate in the meeting.
 - b. If you're using a telephone, please identify yourself with your phone number and state your name and address before you speak. Zoom meeting hosts can see only your telephone number and will ask you to identify yourself.
9. Closed session
 - a. Persons in the Zoom meeting will be put into a waiting room while the committee/commission/board meets in Closed Session. Participants will be admitted back into the Zoom meeting once the committee reconvenes in Open Session.
 - b. Persons watching a Common Council meeting live on YouTube will see a gray screen with the City logo during closed session.
10. Persons interested in attending anonymously or listening to the meeting may call in by dialing *67 followed by the phone number in the Zoom Meeting Information box.

Calling into the Zoom meeting using a smartphone

1. Dial the phone number listed at the beginning of this document.
2. When prompted, enter the Meeting ID number followed by #
3. Once you are in the meeting, notify the meeting host that you are in and state your name.
4. If you do not wish to speak, please make sure your phone is on **Mute**
 - a. If you're using a smartphone, look at your screen and click the Mute button





MINUTES OF THE GREEN BAY HOUSING AUTHORITY

TUESDAY, DECEMBER 20, 2022, 1:30 PM
City Hall, Room 604 - The Harry Maier Room
Virtual attendance is also available via Zoom.

A. ZOOM MEETING INFORMATION.

I. This item contains Zoom information, instructions, and a link to the Virtual Comment Form.

B. ROLL CALL.

I. William VandeCastle - Chair, Terri Refsguard Vice-Chair, Sandra Popp, Erin Edwards and Stephen Srubas

Present: William VandeCastle - Chair, Terri Refsguard - Vice Chair, Erin Edwards and Stephen Srubas. Sandra Popp joined meeting at 1:35 p.m.

Excused: None

C. APPROVAL OF THE AGENDA.

I. Approval of the agenda for the December 20, 2022, meeting of the Green Bay Housing Authority.

Moved by Terri Refsguard, seconded by Stephen Srubas to approve of the agenda for the December 20, 2022, meeting of the Green Bay Housing Authority. Motion carried.

Yes- William VandeCastle and Erin Edwards, No- None, Abstain- None

D. APPROVAL OF MINUTES.

I. Approval of the minutes from the October 20, 2022, meeting of the Green Bay Housing Authority.

Moved by Terri Refsguard, seconded by Stephen Srubas to approve of the minutes from the October 20, 2022, meeting of the Green Bay Housing Authority. Motion carried.

Yes- William VandeCastle and Erin Edwards, No- None, Abstain- None

E. REGULAR BUSINESS.

I. Consideration with possible action on approval of a Memorandum of Understanding and a Seller's Note Letter with Gorman & Company LLC, for the redevelopment of Mason Manor and 41 scattered sites of affordable housing.

Moved by William VandeCastle, seconded by Stephen Srubas to open the floor for discussion. Motion carried.

Yes- Terri Refsguard, Erin Edwards and Sandra Popp, No- None, Abstain- None

1:35 PM Ted Matkom speaks.

1:56 PM Attorney Paul Dombrowski speaks.

Moved by Sandra Popp, seconded by Erin Edwards to close the floor for discussion. Motion carried.

Yes- William VandeCastle, Terri Refsguard and Stephen Srubas, No- None, Abstain- None

Moved by William VandeCastle, seconded by Erin Edwards to approve of the Memorandum of Understanding. Motion carried.

Yes- Terri Refsguard, Stephen Srubas and Sandra Popp, No- None, Abstain- None

Moved by William VandeCastle, seconded by Erin Edwards to approve of the Seller's Note Letter with Gorman & Company LLC, for the redevelopment of Mason Manor and 41 scattered sites of affordable housing. Motion carried.

Yes- Terri Refsguard, Stephen Srubas and Sandra Popp, No- None, Abstain- None

F. INFORMATIONAL.

1. GBHA Bills.

Stephanie Schmutzer presented the GBHA Bills. No action needed.

2. GBHA Financial Report.

Stephanie Schmutzer presented the GBHA Financial Report. No action needed.

3. Langan Report.

4. Director's Report.

Cheryl Renier-Wigg presents the Director's Report. No action needed.

5. Occupancy Report.

Jayne Valentine presents the Occupancy Report. No action needed.

6. Date of the next meeting January 19, 2023.

G. ADJOURNMENT.

Moved by Erin Edwards, seconded by Terri Refsguard to adjourn the Green Bay Housing Authority meeting. Motion carried.

Yes- William VandeCastle, Stephen Srubas and Sandra Popp, No- None, Abstain- None



Report to the
**Housing Authority
of the City of Green Bay**

MEETING DATE

May 18, 2023

PREPARED BY

Stephanie Schmutzer, Staff

AGENDA ITEM # E.I

Public Hearing regarding the Capital Funding Projects for the Green Bay Housing Authority.

BACKGROUND

The public hearing is a requirement of the Housing and Urban Development Capital Fund Program. This is required yearly prior to funds being released to the housing authority.

RECOMMENDATION**FISCAL IMPACT****ATTACHMENTS**

1. GBHA 2023 public notice
2. CFP worksheet 2023

State of Wisconsin
Brown County

NOTICE TO THE PUBLIC

The Housing Authority of the City of Green Bay (WI074) will hold a Public Hearing on Thursday, May 18, 2023, at 10:30 a.m. at City of Green Bay's City Hall, 100 N Jefferson St, Room 604, Green Bay, WI, to address the Capital Fund Projects and its 5-year plan. The Green Bay Housing Authority is amending its 5-year PHA Plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Green Bay Housing Authority will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-I and any successor Notices. Information relevant to the hearing and any determination of the Authority regarding changes to the Capital Fund Projects Grant Budget to be considered at the public hearing are available for inspection by the public at the Housing Authority Administrative Office, Room 608, City Hall, 100 N. Jefferson Street, Green Bay, WI. The Housing Authority's hours of operation are from 8:00 a.m. to 4:30 p.m., Monday through Friday. Interested persons with questions or comments can contact Stephanie Schmutzer, Accountant, at (920) 448-3409.

The meeting will be conducted both in person in Room 604, City Hall, 100 N Jefferson St. and virtually through Zoom. If you wish to participate in a Public Hearing, you may access the meeting in person or by the internet or telephone, using the access code below.

Join Zoom Meeting

<https://us02web.zoom.us/j/81434999289?pwd=N0dIMGxWSS85SGswK2lZeGhZZUN0UT09>

Meeting ID: 814 3499 9289

Passcode: 483400

One tap mobile

+13017158592,,81434999289# US (Washington DC)

+13126266799,,81434999289# US (Chicago)

Dial by your location

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

Jayne Valentine
Housing Administrator

Publication Date: March 31, 2023

Green Bay Housing Authority

Capital Funds Program Budget

2023

SS

Roofs / Gutters/ chimneys /vents	-
Siding	-
Cabinets/Counters/Vanities	-
Architecture & Engineering	-
Windows/Doors	-
Flooring	-
Garages/sheds/Fencing	-
Electrical rewiring /lighting	-
Concrete repair	-
stoops/stairs/decks/porches	-
water heaters	-
HVAC/furnaces	-
Plumbing work	-
Full unit rehab - interior	-
Full unit rehab - exterior	-

\$ -

MM

water heaters	1
Plumbing work	1
Concrete repair	1
Full Unit Rehab - Interior	1
Modernize/expand tub rooms	1
Roofing	1
Elevators replacement/upgrade	1
Refrigerators/Washers/Dryers	1
Remodel community room	1
Furnaces & HVAC	1
Drain work/resealing/Resurface/reline	
parking lots	1
Generator	1
Boilers	1
Electrical rewiring /lighting	1
Architecture & Engineering	1
Flooring	222,064
Windows/Doors	200,000
Smoke & CO Detectors	1

\$ 422,080

Admin

Admin	3,000
Tech Upgrades	2,000

\$ 5,000

\$ 427,080



Report to the
**Housing Authority
of the City of Green Bay**

MEETING DATE

May 18, 2023

PREPARED BY

Jayne Valentine, Staff

AGENDA ITEM # E.2

Public hearing regarding the amendment of the Green Bay Housing Authority's 5 year plan.

BACKGROUND

The Green Bay Housing Authority is requesting to amend the current 5 year PHA plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Green Bay Housing Authority will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-1 and any successor Notices.

In conjunction and simultaneously with RAD, the Green Bay Housing Authority will also be utilizing Section 18 under the guidelines set forth in PIH Notice 2021-07 which allows the Green Bay Housing Authority to dispose of up to 60% of its units through Section 18. Upon conversion

RECOMMENDATION

Approval of the amended 5 year plan for the Green Bay Housing Authority to include the conversion of rental units to Rental Assistance Demonstration (RAD) and Section 18 Project Based Voucher Assistance.

FISCAL IMPACT

ATTACHMENTS

- I. Public Hearing Amendment of Annual Plan

5-Year PHA Plan (for All PHAs)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB No. 2577-0226
Expires: 02/29/2016

Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

Applicability. Form HUD-50075-5Y is to be completed once every 5 PHA fiscal years by all PHAs.

A. PHA Information

A.1 PHA Name: Housing Authority of the City of Green Bay PHA Code: WI074

PHA Plan for Fiscal Year Beginning: 07/01/2020

PHA Plan Submission Type: ☐ 5-Year Plan Submission ☒ Revised 5-Year Plan Submission

Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information on the PHA policies contained in the standard Annual Plan, but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official websites. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.

The Green Bay Housing Authority is amending its 5-year PHA Plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Green Bay Housing Authority will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-1 and any successor Notices.

In conjunction and simultaneously with RAD, the Green Bay Housing Authority will also be utilizing Section 18 under the guidelines set forth in PIH Notice 2021-07 which allows the Green Bay Housing Authority to dispose of up to 60% of its units through Section 18.

☐ PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below)

Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program	
				PH	HCV
Lead PHA:					

B.	5-Year Plan. Required for all PHAs completing this form.
B.1	Mission. State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA's jurisdiction for the next five years. <i>The Housing Authority of the City of Green Bay will provide for the affordable housing needs of income eligible households through the administration of public housing resources in the City of Green Bay and through partnerships with private and not for profit developers.</i>
B.2	Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low- income, and extremely low- income families for the next five years. See attachment B.2
B.3	Progress Report. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. See attachment B.3
B.4	Violence Against Women Act (VAWA) Goals. Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking. <i>The Housing Authority of the City of Green Bay will support the goals of the VAWA Amendments and will comply with its requirements. The GBHA will continue to administer its housing programs in ways that support and protect residents and applicants who may be victims of domestic violence, dating violence, sexual assault, or stalking. The GBHA will not take any adverse action against a resident, participant or applicant solely on the basis of his or her being a victim of such criminal activity, including threats of such activity. Adverse action includes denial or termination of housing assistance. The GBHA will not subject a victim of domestic violence, dating violence, sexual assault, or stalking to a more demanding standard for lease compliance than other residents. The PHA has developed policies and procedures as need to implement the requirements of VAWA.</i> See attachment B.4
B.5	Significant Amendment or Modification. Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan. <i>The GBHA defines a significant amendment and substantial deviation/modification as any change in policy which significantly and substantial alters the Authority's stated mission and the persons the Authority serves. This would include admission preferences. Discretionary or administrative amendments consistent with the Authority's stated overall mission and basics objections will not be considered substantial deviations or significant modifications.</i>
B.6	Resident Advisory Board (RAB) Comments. (a) Did the RAB(s) provide comments to the 5-Year PHA Plan? Y N ☒ ☐ (b) If yes, comments must be submitted by the PHA as an attachment to the 5-Year PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.
B.7	Certification by State or Local Officials. <u>Form HUD 50077-SL</u>, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.

Instructions for Preparation of Form HUD-50075-5Y

5-Year PHA Plan for All PHAs

A. PHA Information 24 CFR §903.23(4)(e)

- A.1** Include the full PHA Name, PHA Code, , PHA Fiscal Year Beginning (MM/YYYY), PHA Plan Submission Type, and the Availability of Information, specific location(s) of all information relevant to the hearing and proposed PHA Plan.

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table.

B. 5-Year Plan.

- B.1 Mission.** State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA's jurisdiction for the next five years. (24 CFR §903.6(a)(1))
- B.2 Goals and Objectives.** Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low- income, and extremely low- income families for the next five years. (24 CFR §903.6(b)(1)) For Qualified PHAs only, if at any time a PHA proposes to take units offline for modernization, then that action requires a significant amendment to the PHA's 5-Year Plan.
- B.3 Progress Report.** Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5- Year Plan. (24 CFR §903.6(b)(2))
- B.4 Violence Against Women Act (VAWA) Goals.** Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking. (24 CFR §903.6(a)(3))
- B.5 Significant Amendment or Modification.** Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan.
- B.6 Resident Advisory Board (RAB) comments.**
- (a) Did the public or RAB provide comments?
 - (b) If yes, submit comments as an attachment to the Plan and describe the analysis of the comments and the PHA's decision made on these recommendations. (24 CFR §903.17(a), 24 CFR §903.19)

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year PHA Plan. The 5-Year PHA Plan provides the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families and the progress made in meeting the goals and objectives described in the previous 5-Year Plan.

Public reporting burden for this information collection is estimated to average .76 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.

GBHA 2020 Goals for PHA Plan

Goal: Improve the quality of public housing units

Objective: Implement at least 3 additional safety & security measures in public housing units.

Objective: Implement at least one energy efficiency measure at Mason Manor and Scattered Sites.

Goal: Manage the properties in an accountable and responsible manner

Objective: Achieve High Performer Status.

Objective: Maintain occupancy rate to at least 96 percent for both Mason Manor and Scattered Sites.

Objective: Continue to average a 30 day unit turnaround time for units not needing extensive unit rehab.

Objective: Perform quarterly quality control reviews of resident re-certifications.

Goal: Improve the quality of life for GBHA residents

Objective: Implement a program or collaborate with a local service provider to implement/ promote at least one program aimed at improving residents' employability, increase their self-sufficiency, improve their wellbeing, or allow them to age in place.

Goal: Ensure equal opportunity and affirmatively further fair housing

Objective: Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability.

Objective: Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status, and disability.

Objective: Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required.

Goal: Reposition all public housing units

Objective: Transfer the Scattered Sites public housing units to Section 18 through demolition and/or disposition.

Objective: *Transfer Mason Manor public housing units to; mixed finance, modernization or development, demolition and/or disposition, or conversion to project-based assistance under rental assistance demonstration.*

Goal: Work toward ending homelessness

Objective: *Work collaboratively with City, County and non-profit groups to craft a plan of action to greatly reduce and end homelessness in Brown County.*

Progress of GBHA 2015 Goals for PHA Plan

Goal: *Improve the quality of public housing units*

Objective: *Implement at least 3 additional safety & security measures in public housing units*

Progress:

- FY 2015:
 - o Completed reconstruction of the dumpster area at Mason Manor, purchased and installed new smoke detectors/carbon monoxide detectors at Mason Manor and Scattered Sites, repaired Mason Manor parking lot lighting.
- FY 2016:
 - o Began construction of new GBHA office (which eliminated visitors from accessing other parts of the building), continued to use LED lighting throughout all properties.
- FY 2017:
 - o Completed new GBHA office, had repairs completed to retaining wall, replaced damaged stoop rails at 2 Scattered Site properties, installed lateral to mini-sewer at 3 Scattered Site properties, Lead Base paint testing at 20 Scattered Sites, completed overhead garage door replacement at 3 Scattered Sites, established campus-wide smoke free policy at both Mason Manor and all Scattered Sites.
- FY 2018:
 - o Mud jacked sidewalks at Scattered Site properties, replaced 3 garage doors at Scattered Site properties and performed maintenance on another 25, updated smoke detectors/carbon monoxide detectors at Scattered Site properties. Updated elevator transfer switch to successfully have a backup power source at Mason Manor, completed tuck pointing contract and repaved parking lot with new stripping, replaced Mason Manor's main entrance doors.

Objective: *Implement at least one energy efficiency measure at Mason Manor*

Progress: Replaced light fixtures within Mason Manor and Scattered Sites units to LED and also updated fixtures in hallways and the outdoor lighting to LED as well.

Goal: *Manage the properties in an accountable and responsible manner*

Objective: *Achieve High Performer status a minimum of 3 out of the next 5 years.*

Progress: the GBHA did not achieve high performer status.

Objective: *Increase occupancy rate to at least 96 percent for each of Mason Manor and Scattered Site*

Progress: The GBHA maintains a minimum of 96 percent or higher vacancy rate for both Mason Manor and Scattered Sites.

Objective: Reduce turnaround time of vacated units not needing major rehab to no more than 30 days.

Progress: The GBHA averages 30 days or less for both Mason Manor and Scattered Sites for unit turnovers that do not need major rehab or units that were approved to be offline by the HUD field office.

Objective: Continue to perform quarterly quality control reviews of resident recertifications

Progress: Quarterly quality control reviews are completed each quarter.

Goal: Improve the quality of life for GBHA residents

Objective: Implement a program or collaborate with a local service provider to implement/ promote at least one program aimed at improving residents' employability, increase their self-sufficiency, improve their wellbeing, or allow them to age in place.

Progress: contracted with WISE Program to enhance Nutrition Program (Meals on Wheels) at Mason Manor; created and hired an administrative assistant position, Applied and received HUD ROSS's grant which allowed the GBHA to contract with Lutheran Social Services to provide a Service Coordinator. Reinstated a hair beautician at Mason Manor, updated the Mason Manor workout room, and received WHEDA grant in the amount of \$25,000 to update the Mason Manor community kitchen.

Goal: Ensure equal opportunity and affirmatively further fair housing

Objective: Undertake affirmative measures to **ensure access** to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability.

Objective: Undertake affirmative measures to **provide a suitable living environment** for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status, and disability.

Objective: Undertake affirmative measures to **ensure accessible housing** to persons with all varieties of disabilities regardless of unit size required.

Progress for all three above objectives: The GBHA agreed to join consortium of local agencies required to complete Affirmatively Furthering Fair Housing

requirements, which will be required starting in 2020. The GBHA has continued a partnership with Fair Housing Center of Northeast Wisconsin and makes referrals to HUD's Fair Housing Department and other agencies that can provide services to ensure equal opportunities in housing. In addition, the GBHA currently employs bilingual/bi-cultural staff.

Green Bay Housing Authority

Model Emergency Transfer Plan for Victims of Domestic Violence, Dating Violence, Sexual Assault, or Stalking

Emergency Transfers

The Green Bay Housing Authority (GBHA) is concerned about the safety of its tenants, and such concern extends to tenants who are victims of domestic violence, dating violence, sexual assault, or stalking. In accordance with the Violence Against Women Act (VAWA),¹ GBHA allows tenants who are victims of domestic violence, dating violence, sexual assault, or stalking to request an emergency transfer from the tenant's current unit to another unit. The ability to request a transfer is available regardless of sex, gender identity, or sexual orientation.² The ability of GBHA to honor such request for tenants currently receiving assistance, however, may depend upon a preliminary determination that the tenant is or has been a victim of domestic violence, dating violence, sexual assault, or stalking, and on whether GBHA has another dwelling unit that is available and is safe to offer the tenant for temporary or more permanent occupancy.

This plan identifies tenants who are eligible for an emergency transfer, the documentation needed to request an emergency transfer, confidentiality protections, how an emergency transfer may occur, and guidance to tenants on safety and security. This plan is based on a model

¹ Despite the name of this law, VAWA protection is available to all victims of domestic violence, dating violence, sexual assault, and stalking, regardless of sex, gender identity, or sexual orientation.

² Housing providers cannot discriminate on the basis of any protected characteristic, including race, color, national origin, religion, sex, familial status, disability, or age. HUD-assisted and HUD-insured housing must be made available to all otherwise eligible individuals regardless of actual or perceived sexual orientation, gender identity, or marital status.

emergency transfer plan published by the U.S. Department of Housing and Urban Development (HUD), the Federal agency that oversees that Public Housing is in compliance with VAWA.

Eligibility for Emergency Transfers

A tenant who is a victim of domestic violence, dating violence, sexual assault, or stalking, as provided in HUD's regulations at 24 CFR part 5, subpart L is eligible for an emergency transfer, if: the tenant reasonably believes that there is a threat of imminent harm from further violence if the tenant remains within the same unit. If the tenant is a victim of sexual assault, the tenant may also be eligible to transfer if the sexual assault occurred on the premises within the 90-calendar-day period preceding a request for an emergency transfer.

A tenant requesting an emergency transfer must expressly request the transfer in accordance with the procedures described in this plan.

Tenants who are not in good standing may still request an emergency transfer if they meet the eligibility requirements in this section.

Emergency Transfer Request Documentation

To request an emergency transfer, the tenant shall notify GBHA's management office and submit a written request for a transfer. GBHA will provide reasonable accommodations to this policy for individuals with disabilities. The tenant's written request for an emergency transfer should include either:

1. A statement expressing that the tenant reasonably believes that there is a threat of imminent harm from further violence if the tenant were to remain in the same dwelling unit assisted under GBHA's program; OR

2. A statement that the tenant was a sexual assault victim and that the sexual assault occurred on the premises during the 90-calendar-day period preceding the tenant's request for an emergency transfer.

Confidentiality

GBHA will keep confidential any information that the tenant submits in requesting an emergency transfer, and information about the emergency transfer, unless the tenant gives GBHA written permission to release the information on a time limited basis, or disclosure of the information is required by law or required for use in an eviction proceeding or hearing regarding termination of assistance from the covered program. This includes keeping confidential the new location of the dwelling unit of the tenant, if one is provided, from the person(s) that committed an act(s) of domestic violence, dating violence, sexual assault, or stalking against the tenant. See the Notice of Occupancy Rights under the Violence Against Women Act For All Tenants for more information about GBHA's responsibility to maintain the confidentiality of information related to incidents of domestic violence, dating violence, sexual assault, or stalking.

Emergency Transfer Timing and Availability

GBHA cannot guarantee that a transfer request will be approved or how long it will take to process a transfer request. GBHA will, however, act as quickly as possible to move a tenant who is a victim of domestic violence, dating violence, sexual assault, or stalking to another unit, subject to availability and safety of a unit. If a tenant reasonably believes a proposed transfer would not be safe, the tenant may request a transfer to a different unit. If a unit is available, the transferred tenant must agree to abide by the terms and conditions that govern occupancy in the unit to which the tenant has been transferred. GBHA may be unable to transfer a tenant to a particular unit if the tenant has not or cannot establish eligibility for that unit.

If GBHA has no safe and available units for which a tenant who needs an emergency is eligible, GBHA will assist the tenant in identifying other housing providers who may have safe and available units to which the tenant could move. At the tenant's request, GBHA will also assist tenants in contacting the local organizations offering assistance to victims of domestic violence, dating violence, sexual assault, or stalking that are attached to this plan.

Safety and Security of Tenants

Pending processing of the transfer and the actual transfer, if it is approved and occurs, the tenant is urged to take all reasonable precautions to be safe.

Tenants who are or have been victims of domestic violence are encouraged to contact the National Domestic Violence Hotline at 1-800-799-7233, or a local domestic violence shelter, for assistance in creating a safety plan. For persons with hearing impairments, that hotline can be accessed by calling 1-800-787-3224 (TTY).

Tenants who have been victims of sexual assault may call the Rape, Abuse & Incest National Network's National Sexual Assault Hotline at 800-656-HOPE, or visit the online hotline at <https://ohl.rainn.org/online/>.

Tenants who are or have been victims of stalking seeking help may visit the National Center for Victims of Crime's Stalking Resource Center at <https://www.victimsofcrime.org/our-programs/stalking-resource-center>.

Attachment: Local organizations offering assistance to victims of domestic violence, dating violence, sexual assault, or stalking.

Local Organizations Offering Assistance to Victims of Domestic Violence, Dating Violence, Sexual Assault, or Stalking

Golden House
1120 University Ave.
Green Bay, WI 54302
Phone: (920) 435-0100
Emergency 24/7 Hotline: (920) 432-4244 Toll Free: 1-877-431-4321
<http://www.goldenhousegb.org/>

Golden House offers legal advocacy, individual counseling, and support groups for victims and their families. They also provide safe emergency shelter for victims and their families in their 40 bed temporary housing facility.

Wise Women Gathering Place
2482 Babcock Rd,
Green Bay WI 54313
Phone: (920) 490-0627
<https://www.wisewomengp.org/>

Wise Women Gathering Place offers resources to families impacted by domestic violence, dating violence, sexual assault, or stalking. They provide support groups and transitional housing options in addition to their many other skill-building community resources.

Catholic Charities of the Diocese of Green Bay
1825 Riverside drive
Green Bay, WI 54313
Phone: (920) 272-8234
charitiesgb@gbdioc.org
<http://newcatholiccharities.org/counseling/domestic-violence>

Catholic Charities of the Diocese of Green Bay collaborates with several organizations to provide individuals and families safe shelter, advocacy and support.



Green Bay Housing Authority
1424 Admiral Court
Green Bay, Wisconsin 54303-2157
www.greenbaywi.gov

Phone 920.492.3790
Fax 920.492.3789

Minutes

Resident Advisory Board Meeting

DATE March 21, 2023

TIME 1:30 p.m.

Residents In attendance:

Leah Cardimona, Josie Vandenheuvel, Jutta Hollingsworth, Anita Toney, Rosa Vann, Elizabeth Tandoh, Migdalia Diaz

Agenda

- I. Staffing updates
- II. Amendment to GBHA's 5 year plan
 - a. Section 18/RAD conversion from Public Housing
 - b. Inspections
- III. 3/23/23 Staff Meeting with Developers on vision board
- IV. Washer & Dryers
- V. Tax day at Mason Manor 3/25/2023

Minutes

- I. Staffing updates: Mason Manor has hired a new ROSS Services Coordinator, Amy Zaidel, who is contracted through Lutheran Social Services.
- II. Amendment to GBHA's 5-year plan: Staff is requesting to make an amendment to the current 2020 5-year plan. Mason Manor will no longer be Public Housing and will be converting to Rental Assistance Demonstration (RAD)/Section 18 Blend which provides tenants with a protected voucher while living here at Mason Manor.
The Green Bay Housing Authority is amending its 5-year PHA Plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Green Bay Housing Authority will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-1 and any successor Notices.
Tenants will continue to pay 30% of their adjusted annual income towards rent. Integrated Community Solutions (Brown County Housing Authority's subcontractor) will be calculating rent amounts and conducting annual Housing Quality Standards (HQS) inspections.
New leases will be created and required to be signed by all tenants as the current lease for Mason Manor will be obsolete since it references Mason Manor as a public housing building.
NOTED: no opposing comments by RAB to transition from public housing to RAD/Section 18 Blend, general questions asked in regards to lease and rent subsidy.
- III. After meeting with Gorman & Company, staff will provide a remodel update via the monthly Mason Manor newsletter
- IV. New washers and dryers have been ordered, expect to be on site 30 days after ordering.
- V. AARP will be on site to prepare tenant taxes – few appointments still available if interested, contact office to schedule appointment and get packet for prep.

**Certification by State or Local
Official of PHA Plans Consistency
with the Consolidated Plan or
State Consolidated Plan
(All PHAs)**

U. S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 2/29/2016

**Certification by State or Local Official of PHA Plans
Consistency with the Consolidated Plan or State Consolidated Plan**

I, Neil Stechschulte, the Development Director
Official's Name *Official's Title*

certify that the 5-Year PHA Plan and/or Annual PHA Plan of the

City of Green Bay Housing Authority

PHA Name

is consistent with the Consolidated Plan or State Consolidated Plan and the Analysis of
Impediments (AI) to Fair Housing Choice of the

City of Green Bay

Local Jurisdiction Name

pursuant to 24 CFR Part 91.

Provide a description of how the PHA Plan is consistent with the Consolidated Plan or State
Consolidated Plan and the AI.

The housing needs and strategies to address those needs, as well as the goals and objectives to serve the
needs of low income families, are consistent with the needs, strategies and objective of the City of Green

Bay's Consolidated Plan.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

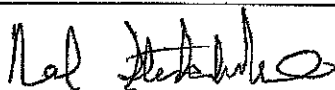
Name of Authorized Official

Neil Stechschulte

Title

Development Director

Signature



Date

2/16/2023

Civil Rights Certification
(Qualified PHAs)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 2577-0226
Expires 02/29/2016

Civil Rights Certification

Annual Certification and Board Resolution

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official, I approve the submission of the 5-Year PHA Plan for the PHA of which this document is a part, and make the following certification and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the public housing program of the agency and implementation thereof:

The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990, and will affirmatively further fair housing by examining their programs or proposed programs, identifying any impediments to fair housing choice within those program, addressing those impediments in a reasonable fashion in view of the resources available and working with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and by maintaining records reflecting these analyses and actions.

City of Green Bay Housing Authority

WI074

PHA Name

PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

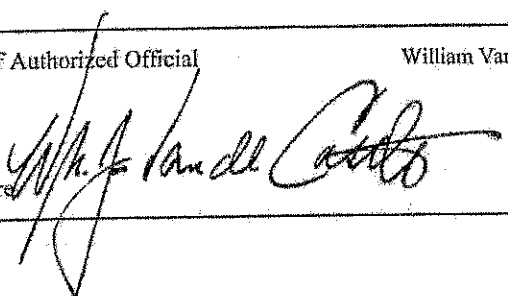
Name of Authorized Official

William VandeCastle

Title

Board Chairman

Signature



Date: February 16, 2023

Housing Authority of the City of Green Bay **PHA Plan Amendment**

Attachment R – Rental Assistance Demonstration (RAD)

The Housing Authority of the City of Green Bay is amending its 5-year PHA Plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Housing Authority of the City of Green Bay will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-1 and any successor Notices. Upon conversion to Project Based Vouchers the Authority will adopt the resident rights, participation, waiting list and grievance procedures listed in Section 1.6 of PIH Notice 2012-32, REV-2; and Joint Housing PIH Notice H-2014-09/PIH-2014-17. These resident rights, participation, waiting list and grievance procedures are appended to this Attachment. Additionally, the Housing Authority of the City of Green Bay certifies that it is currently compliant with all fair housing and civil rights requirements, The site complies with the Site selection requirements set forth at [24 CFR § 983.57], the Fair Housing Act, Title VI of the Civil Rights Act of 1964 including implementing regulations at 24 CFR § 1.4(b)(3), Section 504 of the Rehabilitation Act of 1973 including implementing regulations at 24 CFR § 8.4(b)(5), and the Americans with Disabilities Act.

RAD was designed by HUD to assist in addressing the capital needs of public housing by providing the Housing Authority of the City of Green Bay with access to private sources of capital to repair and preserve its affordable housing assets. Please be aware that upon conversion, the Authority's Capital Fund Budget will be reduced by the pro rata share of Public Housing Developments converted as part of the Demonstration, and that the Housing Authority of the City of Green Bay may also borrow funds to address their capital needs. The Housing Authority of the City of Green Bay will also be contributing Operating Reserves in the amount of \$0.00, Capital Funds in the amount of \$1,356,353.

In conjunction and simultaneously with RAD, the Housing Authority of the City of Green Bay will also be utilizing Section 18 under the guidelines set forth in PIH Notice 2021-07 which allows the Housing Authority of the City of Green Bay to dispose of up to 60% of its units through Section 18.

Below, please find specific information related to the Public Housing Development selected for RAD and Section 18:

Development #1

<u>Name of Public Housing Project</u> Mason Manor	<u>PIC Development ID:</u> WI074000010	<u>Conversion Type PBV</u> RAD Project Based Voucher and Section 18 Demolition / Disposition	<u>Transfer of Assistance:</u> Not Applicable
<u>Total Units:</u> 154	<u>Pre-RAD Unit Type</u> No Preference	<u>Post-RAD unit Type</u> No Preference	<u>Capital Fund allocation of Development</u> \$1,356,353
Bedroom Type	Number of Units Pre-Conversion	Number of Units Post-Conversion	Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, etc)
Studio/Efficiency	-	-	-
One Bedroom	149	148	-1; there is one unit that is currently being used as an office, and will continue to be used as an office post-conversion
Two Bedroom	5	4	-1; there is one unit that is currently being used as an office, and will continue to be used as an office post-conversion
Three Bedroom	-	-	-
Four Bedroom	-	-	-
Five Bedroom	-	-	-
Six Bedroom	-	-	-
<u>(If performing a Transfer of Assistance):</u> Not Applicable			

Resident Rights, Participation, Waiting List and Grievance Procedures

If converting to PBV: (Insert PIH Notice 2012-32, REV-2 Section 1.6.C & Section 1.6.D, and Joint Housing/PIH Notice H-2014-09/ PIH-2014-17, as a whole, into this Attachment to your PHA Plan)

Project Based Voucher Requirements (Section 1.6 of PIH Notice 2012-32, REV-2 and the Joint Housing PIH Notice H-2014- 09/ PIH-2014-17)
Tenant Protections Under Joint Housing PIH Notice H-2014-09/ PIH-2014-17.)
1. Right to Return and Relocation Assistance
Tenant Protections Under Section 1.6.C (PBV)
1. No re-screening of tenants upon conversion
2. Under-Occupied Unit
3. Renewal of Lease
4. Phase-in of tenant rent increase:
5. FSS and ROSS-SC programs;
6. Resident Participation and Funding.
7. Termination notification
8. Grievance process
9. Earned Income Disregard.
10. When Total Tenant Payment Exceeds Gross Rent.
11. Jobs Plus
Tenant Protections Under Section 1.6.D
1. Establishment of Waiting List
2. Choice Mobility

As part of the Rental Assistance Demonstration (RAD), the Housing Authority of the City of Green Bay is redefining the definition of a substantial deviation from the PHA Plan to exclude the following RAD-specific items:

- a. The decision to convert to either Project Based Rental Assistance or Project Based Voucher Assistance;
- b. Changes to the Capital Fund Budget produced as a result of each approved RAD Conversion, regardless of whether the proposed conversion will include use of additional Capital Funds;
- c. Changes to the construction and rehabilitation plan for each approved RAD conversion; and
- d. Changes to the financing structure for each approved RAD conversion.

PBV Section 1.6.C and 1.6.D

B. PBV Resident Rights and Participation.

- 1. No Rescreening of Tenants upon Conversion.** Pursuant to the RAD statute, at conversion, current households are not subject to rescreening, income eligibility, or income targeting. Consequently, current households will be grandfathered for conditions that occurred prior to conversion but will be subject to any ongoing eligibility requirements for actions that occur after conversion. For example, a unit with a household that was over-income at time of conversion would continue to be treated as an assisted unit. Thus, 24 CFR § 982.201, concerning eligibility and targeting, will not apply for current households.²⁴ Once that remaining household moves out, the unit must be leased to an eligible family. MTW agencies may not alter this requirement.
- 2. Right to Return.** Any resident that may need to temporarily be relocated to facilitate rehabilitation or construction has a right to return to an assisted unit at the Covered Project once rehabilitation or construction is completed. Permanent involuntary displacement of residents may not occur as a result of a project's conversion of assistance, including, but not limited to, as a result of a change in bedroom distribution, a de minimis reduction of units, the reconfiguration of efficiency apartments, or the repurposing of dwelling units in order to facilitate social service delivery. Where the transfer of assistance to a new site is warranted and approved (see Section 1.2.A.12 of the PIH Notice 2012-32, Revision 2), residents of the Converting Project will have the right to reside in an assisted unit at the new site once rehabilitation or construction is complete. For more information on how to implement these provisions see the RAD Relocation PIH Notice 2014-17.
- 3. Renewal of Lease.** Since publication of the PIH Notice 2012-32 Rev 1, the regulations under 24 CFR § 983.257(b)(3) have been amended requiring Project Owners to renew all leases upon lease expiration, unless cause exists. MTW agencies may not alter this requirement.
- 4. Phase-in of Tenant Rent Increases.** If a tenant's monthly rent increases by more than the greater of 10 percent or \$25 purely as a result of conversion, the rent increase will be phased in over 3 years. To implement this provision, HUD is specifying alternative requirements for section 3(a)(1) of the Act, as well as 24 CFR § 983.3 (definition of "total tenant payment" (TTP)) to the extent necessary to allow for the phase-in of tenant rent increases. A PHA must create a policy setting the length of the phase in period at three years, five years or a combination depending on circumstances. For example, a PHA may create a policy that uses a three-year phase-in for smaller increases in rent and a five year phase-in for larger increases in rent. This policy must be in place at conversion and may not be modified after conversion.

²⁴ These protections (as well as all protections in this Notice for current households) apply when in order to facilitate repairs a household is relocated following the conversion and subsequently returns to the property, even if they are considered a "new admission" upon return.

The method described below explains the set percentage-based phase-in a Project Owner must follow according to the phase-in period established. For purposes of this section "standard TTP" refers to the TTP calculated in accordance with regulations at 24 CFR §5.628 and the "most recently paid TTP" refers to the TTP recorded on line 9j of the family's most recent HUD Form 50058. If a family in a project converting from Public Housing to PBV was paying a flat rent immediately prior to conversion, the PHA should use the flat rent amount to calculate the phase-in amount for Year 1, as illustrated below.

Three Year Phase-in:

- Year 1: Any recertification (interim or annual) performed prior to the second annual recertification after conversion – 33% of difference between most recently paid Total Tenant Payments (TTP) or flat rent and the standard TTP
- Year 2: Year 2 Annual Recertification (AR) and any Interim Recertification (IR) in prior to Year 3 AR – 66% of difference between most recently paid TTP and the standard TTP
- Year 3: Year 3 AR and all subsequent recertifications – Year 3 AR and any IR in Year 3: Full standard TTP

Please Note: Once the standard TTP is equal to or less than the previous TTP, the phase-in ends and tenants will pay full TTP from that point forward. MTW agencies may not alter this requirement.

- 5. Family Self-Sufficiency (FSS) and Resident Opportunities and Self Sufficiency (ROSS-SC). Family Self-Sufficiency (FSS) and Resident Opportunities and Self Sufficiency (ROSS-SC).** Housing Authority of the City of Green Bay does not run a FS program but may have an opportunity participate in one in the future. GHBA is also a recipient of a ROSS Grant.

Public Housing residents that are current FSS participants will continue to be eligible for FSS once their housing is converted under RAD, and PHAs will be allowed to use any remaining PH FSS funds, to serve those FSS participants who live in units converted by RAD. Due to the program merger between PH FSS and HCV FSS that took place pursuant to the FY14 Appropriations Act (and was continued in the FY15 Appropriations Act), no special provisions are required to continue serving FSS participants that live in public housing units converting to PBV under RAD.

However, PHAs should note that there are certain FSS requirements (e.g. escrow calculation and escrow forfeitures) that apply differently depending on whether the FSS participant is a participant under the HCV program or a public housing resident, and PHAs must follow such requirements accordingly. All PHAs will be required to administer the FSS program in accordance with FSS regulations at 24 CFR Part 984, the participants' contracts of participation, and the alternative requirements established in the "Waivers and Alternative Requirements for the FSS Program" Federal Register notice,

published on December 29, 2014, at 79 FR 78100.²⁵ Further, upon conversion to PBV, already escrowed funds for FSS participants shall be transferred into the HCV escrow account and be considered TBRA funds, thus reverting to the HAP account if forfeited by the FSS participant.

Current ROSS-SC grantees will be able to finish out their current ROSS-SC grants once their housing is converted under RAD. However, once the property is converted, it will no longer be eligible to be counted towards the unit count for future ROSS-SC grants, nor will its residents be eligible to be served by future ROSS-SC grants, which, by statute, can only serve public housing residents.

6. **Resident Participation and Funding.** In accordance with Attachment 1B, residents of Covered Projects with converted PBV assistance will have the right to establish and operate a resident organization for the purpose of addressing issues related to their living environment and be eligible for resident participation funding.
7. **Resident Procedural Rights.** The following items must be incorporated into both the Section 8 Administrative Plan and the Project Owner's lease, which includes the required tenancy addendum, as appropriate. Evidence of such incorporation may be requested by HUD for purposes of monitoring the program.
 - i. HUD is incorporating additional termination notification requirements to comply with section 6 of the Act for public housing projects that convert assistance under RAD. In addition to the regulations at 24 CFR § 983.257 related to Project Owner termination of tenancy and eviction (which MTW agencies may not alter) the termination procedure for RAD conversions to PBV will require that PHAs provide adequate written notice of termination of the lease which shall not be less than:
 - a. A reasonable period of time, but not to exceed 30 days:
 - i. If the health or safety of other tenants, PHA employees, or persons residing in the immediate vicinity of the premises is threatened; or
 - ii. In the event of any drug-related or violent criminal activity or any felony conviction;
 - b. 14 days in the case of nonpayment of rent; and
 - c. 30 days in any other case, except that if a State or local law provides for a shorter period of time, such shorter period shall apply.
 - ii. **Grievance Process.** Pursuant to requirements in the RAD Statute, HUD is establishing additional procedural rights to comply with section 6 of the Act. For issues related to tenancy and termination of assistance, PBV program rules require the Project Owner to provide an opportunity for an informal hearing, as outlined in 24

²⁵ The funding streams for the PH FSS Program and the HCV FSS Program were first merged pursuant to the FY 2014 appropriations act. As a result, PHAs can serve both PH residents and HCV participants, including PBV participants, with FSS funding awarded under the FY 2014 FSS Notice of Funding Availability (FSS NOFA) and any other NOFA under which the combination of funds remains in the applicable appropriations act. For PHAs that had managed both programs separately and now have a merged program, a conversion to PBV should not impact their FSS participants.

CFR § 982.555. RAD will specify alternative requirements for 24 CFR § 982.555(b) in part, which outlines when informal hearings are not required, to require that:

- a. In addition to reasons that require an opportunity for an informal hearing given in 24 CFR § 982.555(a)(1)(i)-(vi),²⁶ an opportunity for an informal hearing must be given to residents for any dispute that a resident may have with respect to a Project Owner action in accordance with the individual's lease or the contract administrator in accordance with RAD PBV requirements that adversely affect the resident's rights, obligations, welfare, or status.
 - i. For any hearing required under 24 CFR § 982.555(a)(1)(i)-(vi), the contract administrator will perform the hearing, as is the current standard in the program. The hearing officer must be selected in accordance with 24 CFR § 982.555(e)(4)(i).
 - ii. For any additional hearings required under RAD, the Project Owner will perform the hearing.
- b. There is no right to an informal hearing for class grievances or to disputes between residents not involving the Project Owner or contract administrator.
- c. The Project Owner gives residents notice of their ability to request an informal hearing as outlined in 24 CFR § 982.555(c)(1) for informal hearings that will address circumstances that fall outside of the scope of 24 CFR § 982.555(a)(1)(i)-(vi).
- d. The Project Owner provides opportunity for an informal hearing before an eviction.

Current PBV program rules require that hearing procedures must be outlined in the PHA's Section 8 Administrative Plan.

8. **Earned Income Disregard (EID).** Tenants who are employed and are currently receiving the EID exclusion at the time of conversion will continue to receive the EID after conversion, in accordance with regulations at 24 CFR § 5.617. Upon the expiration of the EID for such families, the rent adjustment shall not be subject to rent phase-in, as described in Section 1.6.C.4; instead, the rent will automatically rise to the appropriate rent level based upon tenant income at that time.

Under the Housing Choice Voucher program, the EID exclusion is limited only to persons with disabilities (24 CFR § 5.617(b)). In order to allow all tenants (including non-disabled persons) who are employed and currently receiving the EID at the time of conversion to continue to benefit from this exclusion in the PBV project, the provision in section 5.617(b) limiting EID to disabled persons is waived. The waiver, and resulting alternative requirement, apply only to tenants receiving the EID at the time of conversion. No other tenant (e.g., tenants who at one time received the EID but are not receiving the EID exclusion at the time of conversion e.g., due to loss of employment; tenants that move into the property following conversion, etc.) is covered by this waiver.

²⁶ § 982.555(a)(1)(iv) is not relevant to RAD as the tenant-based certificate has been repealed.

9. Jobs Plus. Jobs Plus grantees awarded FY14 and future funds that convert the Jobs Plus target projects(s) under RAD will be able to finish out their Jobs Plus period of performance at that site unless significant re-location and/or change in building occupancy is planned. If either is planned at the Jobs Plus target project(s), HUD may allow for a modification of the Jobs Plus work plan or may, at the Secretary's discretion, choose to end the Jobs Plus program at that project.

10. When Total Tenant Payment Exceeds Gross Rent. Under normal PBV rules, the PHA may only select an occupied unit to be included under the PBV HAP contract if the unit's occupants are eligible for housing assistance payments (24 CFR §983.53(d)). Also, a PHA must remove a unit from the contract when no assistance has been paid for 180 days because the family's TTP has risen to a level that is equal to or greater than the contract rent, plus any utility allowance, for the unit (i.e., the Gross Rent)) (24 CFR §983.258). Since the rent limitation under this Section of the Notice may often result in a family's TTP equaling or exceeding the gross rent for the unit, for current residents (i.e residents living in the public housing property prior to conversion), HUD is waiving both of these provisions and requiring that the unit for such families be placed on and/or remain under the HAP contract when TTP equals or exceeds than the Gross Rent. Further, HUD is establishing the alternative requirement that the rent to owner for the unit equal the family's TTP until such time that the family is eligible for a housing assistance payment. HUD is waiving as necessary to implement this alternative provision, the provisions of Section 8(o)(13)(H) of the Act and the implementing regulations at 24 CFR 983.301 as modified by Section 1.6.B.5 of this Notice.²⁷ In such cases, the resident is considered a participant under the program and all of the family obligations and protections under RAD and PBV apply to the resident. Likewise, all requirements with respect to the unit, such as compliance with the HQS requirements, apply as long as the unit is under HAP contract. Assistance may subsequently be reinstated if the tenant becomes eligible for assistance. The PHA is required to process these individuals through the Form- 50058 submodule in PIC.

Following conversion, 24 CFR §983.53(d) applies, and any new families referred to the RAD PBV project must be initially eligible for a HAP payment at admission to the program, which means their TTP may not exceed the gross rent for the unit at that time. Further, a PHA must remove a unit from the contract when no assistance has been paid for 180 days. If units are removed from the HAP contract because a new admission's TTP comes to equal or exceed the gross rent for the unit and if the project is fully assisted, HUD is imposing an alternative requirement that the PHA must reinstate the unit after the family has vacated the property; and, if the project is partially assisted, the PHA may substitute a different unit for the unit on the HAP contract in accordance with 24 CFR §983.207 or, where "floating" units have been permitted, Section 1.6.B.10 of this Notice.

²⁷ For example, a public housing family residing in a property converting under RAD has a TTP of \$600. The property has an initial Contract Rent of \$500, with a \$50 Utility Allowance. Following conversion, the residents is still responsible for paying \$600 in tenant rent and utilities.

- 11. Under-occupied Units.** If a family is in an under-occupied unit under 24 CFR 983.259 at the time of conversion, the family may remain in this unit until an appropriate-sized unit becomes available in the Covered Project. When an appropriate sized unit becomes available in the Covered Project, the family living in the under-occupied unit must move to the appropriate-sized unit within a reasonable period of time, as determined by the administering Voucher Agency. In order to allow the family to remain in the under-occupied unit until an appropriate-sized unit becomes available in the Covered Project, 24 CFR 983.259 is waived. MTW agencies may not modify this requirement.

C. PBV: Other Miscellaneous Provisions.

- 1. Access to Records, including Requests for Information Related to Evaluation of Demonstration.** PHAs must agree to any reasonable HUD request for data to support program evaluation, including but not limited to project financial statements, operating data, Choice-Mobility utilization, and rehabilitation work. Please see Appendix IV for reporting units in Form HUD-50058.
- 2. Additional Monitoring Requirement.** The PHA's Board must approve the operating budget for the Covered Project annually in accordance with HUD requirements.²⁸
- 3. Davis-Bacon prevailing wages and Section 3 of the Housing and Urban Development Act of 1968 (Section 3).**
 - i. Davis-Bacon prevailing wages.** The Davis-Bacon prevailing wage requirements (prevailing wages, the Contract Work Hours and Safety Standards Act, and other related regulations, rules, and requirements) apply to all initial repairs and new construction that are identified in the Financing Plan to the extent that such repairs or construction qualify as development. "Development," as applied to work subject to Davis-Bacon requirements on Section 8 projects, encompasses work that constitutes remodeling that alters the nature or type of housing units in a PBV or PBRA project, reconstruction, or a substantial improvement in the quality or kind of original equipment and materials, and is initiated within 18 months of the HAP contract. Development activity does not include replacement of equipment and materials rendered unsatisfactory because of normal wear and tear by items of substantially the same kind. Davis-Bacon requirements apply only to projects with nine or more assisted units.
 - ii. Section 3 of the Housing and Urban Development Act of 1968 (Section 3).** Section 3 (24 CFR Part 135) applies to all initial repairs and new constructions that are identified in the Financing Plan to the extent that such repairs qualify as construction or rehabilitation. In addition, Section 3 may apply to the project after conversion based on the receipt of the use of federal financial assistance for rehabilitation activities.

²⁸ For PBV conversions that are not FHA-insured, a future HUD notice will describe project financial data that may be required to be submitted by a PBV owner for purposes of the evaluation, given that PBV projects do not submit annual financial statements to HUD/REAC.

4. Establishment of Waiting List. The Project Owner can utilize a project-specific or community waiting list. The PHA shall consider the best means to transition applicants from the current public housing waiting list, including:

- i. Transferring an existing site-based waiting list to a new site-based waiting list. If the PHA is transferring the assistance to another neighborhood, the PHA must notify applicants on the wait-list of the transfer of assistance, and on how they can apply for residency at the new project site or other sites. Applicants on a project-specific waiting list for a project where the assistance is being transferred shall have priority on the newly formed waiting list for the new project site in accordance with the date and time of their application to the original project's waiting list.
- ii. Informing applicants on the site-based waiting list on how to apply for a community-wide waiting list.
- iii. Informing applicants on a public housing community-wide waiting list on how to apply for a new community-wide or site-based waiting list. If using a site-based waiting list, PHAs shall establish a waiting list in accordance 24 CFR § 903.7(b)(2)(ii)-(iv) to ensure that applicants on the PHA's public housing community-wide waiting list have been offered placement on the converted project's initial waiting list. In both cases, PHAs have the discretion to determine the most appropriate means of informing applicants on the public housing community-wide waiting list, given the number of applicants, PHA resources, and admissions requirements of the projects being converted under RAD. A PHA may consider contacting every applicant on the public housing waiting list via direct mailing; advertising the availability of housing to the population that is less likely to apply, both minority and non-minority groups, through various forms of media (e.g., radio stations, posters, newspapers) within the marketing area; informing local non-profit entities and advocacy groups (e.g., disability rights groups); and conducting other outreach as appropriate. Applicants on the agency's public housing community-wide waiting list who wish to be placed onto the newly-established site-based waiting list must be placed in accordance with the date and time of their original application to the centralized public housing waiting list. Any activities to contact applicants on the public housing waiting list must be conducted in accordance with the requirements for effective communication with persons with disabilities at 24 CFR § 8.6 and the obligation to provide meaningful access for persons with limited English proficiency (LEP).²⁹

A PHA must maintain any site-based waiting list in accordance with all applicable civil rights and fair housing laws and regulations.

To implement this provision, HUD is specifying alternative requirements for 24 CFR § 983.251(c)(2). However, after the initial waiting list has been established, the PHA shall administer its waiting list for the converted project in accordance with 24 CFR § 983.251(c).

²⁹ For more information on serving persons with LEP, please see HUD's Final guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons (72 FR 2732), published on January 22, 2007.

5. **Mandatory Insurance Coverage.** The Covered Project shall maintain at all times commercially available property and liability insurance to protect the project from financial loss and, to the extent insurance proceeds permit, promptly restore, reconstruct, and/or repair any damaged or destroyed project property.
6. **Agreement Waiver.** This section has been moved to 1.6.(B)(7).
7. **Future Refinancing.** Project Owners must receive HUD approval for any refinancing or restructuring of permanent debt during the HAP contract term to ensure the financing is consistent with long-term preservation. (Current lenders and investors are also likely to require review and approval of refinancing of the primary permanent debt.)
8. **Administrative Fees for Public Housing Conversions during Transition Period.** For the remainder of the Calendar Year in which the HAP Contract is effective (i.e. "transition period"), RAD PBV projects will be funded with public housing funds. For example, if the project's assistance converts effective July 1, 2015, the public housing Annual Contributions Contract (ACC) between the PHA and HUD will be amended to reflect the number of units under HAP contract, but will be for zero dollars, and the RAD PBV contract will be funded with public housing money for July through December 2015. Since TBRA is not the source of funds, PHAs should not report leasing and expenses into VMS during this period, and PHAs will not receive section 8 administrative fee funding for converted units during this time.

For fiscal years 2014 and 2015, PHAs operating HCV program received administrative fees for units under a HAP contract, consistent with recent appropriation act references to "section 8(q) of the [United States Housing Act of 1937] and related appropriations act provisions in effect immediately before the Quality Housing and Responsibility Act of 1998" and 24 CFR § 982.152(b). During the transition period mentioned in the preceding paragraph, these provisions are waived, and PHAs will not receive section 8 ongoing administrative fees for PBV RAD units.

After this transition period, the section 8 ACC will be amended to include section 8 funding that corresponds to the units covered by the section 8 ACC. At that time, the regular section 8 administrative fee funding provisions will apply.

9. **Choice Mobility.** One of the key features of the PBV program is the mobility component, which provides that if the family has elected to terminate the assisted lease at any time after the first year of occupancy in accordance with program requirements, the PHA must offer the family the opportunity for continued tenantbased rental assistance, in the form of either assistance under the voucher program or other comparable tenant-based rental assistance.

If as a result of participation in RAD a significant percentage of the PHA's HCV program becomes PBV assistance, it is possible for most or all of a PHA's turnover vouchers to be used to assist those RAD PBV families who wish to exercise mobility. While HUD is

committed to ensuring mobility remains a cornerstone of RAD policy, HUD recognizes that it remains important for the PHA to still be able to use tenant-based vouchers to address the specific housing needs and priorities of the community. Therefore, HUD is establishing an alternative requirement for PHAs where, as a result of RAD, the total number of PBV units (including RAD PBV units) under HAP contract administered by the PHA exceeds 20 percent of the PHA's authorized units under its HCV ACC with HUD.

The alternative mobility policy provides that an eligible voucher agency would not be required to provide more than three-quarters of its turnover vouchers in any single year to the residents of Covered Projects. While a voucher agency is not required to establish a voucher inventory turnover cap, if such a cap is implemented, the voucher agency must create and maintain a waiting list in the order in which the requests from eligible households were received. In order to adopt this provision, this alternative mobility policy must be included in an eligible PHA's administrative plan.

To effectuate this provision, HUD is providing an alternative requirement to Section 8(o)(13)(E) and 24 CFR part 983.261(c). Please note that this alternative requirement does not apply to PBVs entered into outside of the context of RAD. MTW agencies may not alter this requirement.

- 10. Reserve for Replacement.** The Project Owner shall establish and maintain a replacement reserve in an interest-bearing account to aid in funding extraordinary maintenance and repair and replacement of capital items in accordance with applicable regulations. The reserve must be built up to and maintained at a level determined by HUD to be sufficient to meet projected requirements. For FHA transactions, Replacement Reserves shall be maintained in accordance with the FHA Regulatory Agreement. For all other transactions, Replacement Reserves shall be maintained in a bank account covered under a General Depository Agreement (HUD-51999) or similar instrument, as approved by HUD, where funds will be held by the Project Owner or mortgagee and may be drawn from the reserve account and used subject to HUD guidelines and as directed by HUD.

**Attachment 1B – Resident Provisions in Conversions of Assistance
from Public Housing to PBRA and PBV**

This Attachment contains two sections, describing:

- 1B.1 Summary of Resident Provisions
 - 1B.2 Resident Participation and Funding
-

1B.1 Summary of Resident Provisions

The following is a summary of special provisions and alternative requirements related to tenants of public housing projects converting under RAD (including for those that will reside in non-RAD PBV units in the Covered project):

- Conversion will be considered a significant action requiring discussion in the PHA's Five-Year Plan, Annual Plan or MTW Plan or requiring a significant amendment to a PHA Plan (see Section 1.5.E. of this Notice);
- Notification of proposed conversion, meetings during the conversion process, written response to residents comments on conversion, and notification of conversion approval and impact (see Section 1.8 of this Notice);
- No rescreening at conversion (see Section 1.6.C.1 of this Notice for conversions to PBV and Section 1.7.B.1. for conversions to PBRA);
- A right to return, which covers the right to return to the rent-assisted property after temporary relocation (when temporary relocation is necessary to facilitate rehabilitation or construction), or the right to occupancy of the new unit if the rental assistance is transferred to a new unit. (See Section 1.4.A.5. of this Notice and the RAD Fair Housing, Civil Rights, and Relocation Notice.)
- Phase-in of tenant rent increases (see Section 1.6.C.3. of this Notice for conversions to PBV and Section 1.7.B.3. for conversions to PBRA);
- Relocation protections, including procedural rights, assistance with moving, and applicable relocation payments. (See Section 1.4.A.5 of this Notice and the RAD Fair Housing, Civil Rights, and Relocation Notice.)
- Continued participation in the ROSS-SC FSS and JobsPlus programs (see Sections 1.6.C.5 and 1.6.C.9 of this Notice, for conversions to PBV and Section 1.7.B.4 for conversions to PBRA);
- Continued Earned Income Disregard (see Section 1.6.C.8 of this Notice, for conversions to PBV and Section 1.7.B.7 for conversions to PBRA);

Attachment 1B: Resident Provisions in Conversions of Assistance from Public Housing

- Continued recognition of and funding for legitimate residents organizations (see Section 1.6.C.6 of this Notice for conversions to PBV, Section 1.7.B.5 of this Notice for conversions to PBRA, and below in Attachment 1B.2 for additional requirements for both programs);
- Procedural rights consistent with section 6 of the Act (see Section 1.6.C.7 of this Notice for conversions to PBV and Section 1.7.B.6 of this Notice for conversions to PBRA); and
- Choice-mobility option allowing a resident to move with a tenant-based voucher after tenancy in the Covered Project (see 24 CFR § 983.260 for conversions to PBV and Section 1.7.C.5 of this Notice for conversions to PBRA).

The foregoing is a summary of special provisions and alternative requirements relating to residents of public housing projects converting to RAD and does not attempt to capture all program requirements and details. For additional information, refer to the full text of this Notice and to the RAD Fair Housing, Civil Rights, and Relocation Notice (Notice H 2016-17; PIH 2016-17).

Attachment 1B: Resident Provisions in Conversions of Assistance from Public Housing

1B.2 Resident Participation and Funding⁹⁸

The following provisions contain the resident participation and funding requirements for public housing conversions to PBRA and PBV, respectively.

A. PBRA: Resident Participation and Funding

Residents of Covered Projects converting assistance to PBRA will have the right to establish and operate a resident organization in accordance with 24 CFR Part 245 (Tenant Participation in Multifamily Housing Projects). In addition, a Project Owner must provide \$25 per occupied unit annually for resident participation, of which at least \$15 per occupied unit shall be provided to the legitimate tenant organization at the covered property. Resident participation funding applies to all occupied units in the Covered Project as well as units which would have been occupied if not for temporary relocation. These funds must be used for resident education, organizing around tenancy issues, and training activities.

In the absence of a legitimate resident organization at a Covered Project, HUD encourages the Project Owner and residents to work together to determine the most appropriate ways to foster a constructive working relationship, including supporting the formation of a legitimate resident organization. Residents are encouraged to contact the Project Owner directly with questions or concerns regarding issues related to their tenancy. Project Owners are also encouraged to actively engage residents in the absence of a resident organization.

Project Owners must make resident participation funds available to residents for organizing activities in accordance with this Notice. Residents must make requests for these funds in writing to the Project Owner. These requests will be subject to approval by the Project Owner. Eligible uses of funds are the same as those permitted under "Guidance on the use of Tenant Participation Funds," Notice PIH 2013-21. The Department strongly encourages residents and Project Owners to resolve questions concerning specific uses of resident participation funds directly. If a dispute over funding arises the resident organization or Project Owner may refer any disputes over funding to the HUD Field Office for intervention only after documented efforts to at direct resolution have proven unsuccessful.

B. PBV: Resident Participation and Funding

To support resident participation following conversion of assistance, residents of Covered Projects converting assistance to the PBV program will have the right to establish and operate a resident organization for the purpose of addressing issues related to their living

⁹⁸ For the purposes of this Attachment, HUD uses the term "Project Owner" to refer to the owner of a Converting Project or Covered Project, as applicable to the context.

Attachment 1B: Resident Provisions in Conversions of Assistance from Public Housing

environment, which includes the terms and conditions of their tenancy as well as activities related to housing and community development.

- 1. Legitimate Resident Organization.** A Project Owner must recognize legitimate resident organizations and give reasonable consideration to concerns raised by legitimate resident organizations. A resident organization is legitimate if it has been established by the residents of a Covered Project, meets regularly, operates democratically, is representative of all residents in the project, and is completely independent of the Project Owner, management, and their representatives.

In the absence of a legitimate resident organization at a Covered Project, HUD encourages the Project Owner and residents to work together to determine the most appropriate ways to foster a constructive working relationship, including supporting the formation of a legitimate resident organization. Residents are encouraged to contact the Project Owner directly with questions or concerns regarding issues related to their tenancy. Project Owners are also encouraged to actively engage residents in the absence of a resident organization.

- 2. Protected Activities.** Project Owners must allow residents and resident organizers to conduct the following activities related to the establishment or operation of a resident organization:
 - a. Distributing leaflets in lobby areas;
 - b. Placing leaflets at or under residents' doors;
 - c. Distributing leaflets in common areas;
 - d. Initiating contact with residents;
 - e. Conducting door-to-door surveys of residents to ascertain interest in establishing a resident organization and to offer information about resident organizations;
 - f. Posting information on bulletin boards;
 - g. Assisting resident to participate in resident organization activities;
 - h. Convening regularly scheduled resident organization meetings in a space on site and accessible to residents, in a manner that is fully independent of management representatives. In order to preserve the independence of resident organizations, management representatives may not attend such meetings unless invited by the resident organization to specific meetings to discuss a specific issue or issues; and
 - i. Formulating responses to Project Owner's requests for:
 - i. Rent increases;
 - ii. Partial payment of claims;
 - iii. The conversion from project-based paid utilities to resident-paid utilities;
 - iv. A reduction in resident utility allowances;
 - v. Major capital additions; and

Attachment 1B: Resident Provisions in Conversions of Assistance from Public Housing

vi. Prepayment of loans.

In addition to these activities, Project Owners must allow residents and resident organizers to conduct other reasonable activities related to the establishment or operation of a resident organization.

Project Owners shall not require residents and resident organizers to obtain prior permission before engaging in the activities permitted in this section.

- 3. Meeting Space.** Project Owners must reasonably make available the use of any community room or other available space appropriate for meetings that is part of the multifamily housing project when requested by:
- a. Residents or a resident organization and used for activities related to the operation of the resident organization; or
 - b. Residents seeking to establish a resident organization or collectively address issues related to their living environment.

Resident and resident organization meetings must be accessible to persons with disabilities, unless this is impractical for reasons beyond the organization's control. If the project has an accessible common area or areas, it will not be impractical to make organizational meetings accessible to persons with disabilities.

Project Owners may charge a reasonable, customary and usual fee, approved by the Secretary as may normally be imposed for the use of such facilities in accordance with procedures prescribed by the Secretary, for the use of meeting space. A PHA may waive this fee.

- 4. Resident Organizers.** A resident organizer is a resident or non-resident who assists residents in establishing and operating a resident organization, and who is not an employee or representative of current or prospective Project Owners, managers, or their agents.

Project Owners must allow resident organizers to assist residents in establishing and operating resident organizations.

- 5. Canvassing.** If a Covered Project has a consistently enforced, written policy against canvassing, then a non-resident resident organizer must be accompanied by a resident while on the property of the project.

Attachment 1B: Resident Provisions in Conversions of Assistance from Public Housing

If a project has a written policy favoring canvassing, any non-resident resident organizer must be afforded the same privileges and rights of access as other uninvited outside parties in the normal course of operations. If the project does not have a consistently enforced, written policy against canvassing, the project shall be treated as if it has a policy favoring canvassing.

A resident has the right not to be re-canvassed against his or her wishes regarding participation in a resident organization.

- 6. Funding.** Project Owners must provide \$25 per occupied unit annually for resident participation, of which at least \$15 per occupied unit shall be provided to the legitimate resident organization at the covered property.⁹⁹ These funds must be used for resident education, organizing around tenancy issues, and training activities. Project Owners must make resident participation funds available to residents for organizing activities in accordance with this Notice. Residents must make requests for these funds in writing to the Project Owner. These requests will be subject to approval by the Project Owner. Eligible use of funds are the same as those permitted under "Guidance on the use of Tenant Participation Funds," Notice PIH 2013-21. The Department strongly encourages residents and Project Owners to resolve questions concerning specific uses of resident participation funds directly. If a dispute over funding arises the resident organization or Project Owner may refer any disputes over funding to the Contract Administrator for intervention only after documented efforts to at direct resolution have proven unsuccessful.

⁹⁹ Resident participation funding applies to all occupied units in the Covered Project as well as units which would have been occupied if not for temporary relocation.



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
WASHINGTON, DC 20410-8000

ASSISTANT SECRETARY FOR HOUSING-
FEDERAL HOUSING COMMISSIONER

Special Attention of:

Public Housing Agencies
Public Housing Hub Office Directors
Public Housing Program Center Directors
Regional Directors
Field Office Directors
RAD Transaction Managers

Notice H 2014-09

PIH 2014-17

Issued: July 14, 2014

This notice remains in effect until amended,
superseded, or rescinded.

Cross Reference: PIH Notice 2012-32 (HA)
REV 1

**Subject: Relocation Requirements under the Rental Assistance Demonstration (RAD)
Program, Public Housing in the First Component**

1. Purpose

This Notice provides public housing agencies (PHAs)¹ and their partners with information and resources on applicable program and relocation assistance requirements when planning for or implementing resident moves as a result of a **Rental Assistance Demonstration (RAD)** conversion² under the first component of the demonstration.³ This Notice provides guidance on RAD relocation requirements and requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, (URA), as they relate to the public housing conversion process under the first component.⁴

¹ This Notice always uses the term "PHA" to refer to the owner of the project prior to and after the RAD conversion, even though, in some cases, the owner of the converted RAD project may be another public entity, a non-profit organization, or other owner (e.g., low-income housing tax credit owner). In addition, this Notice uses "PHA" to refer to the "displacing agency," a URA term that means the agency or person that carries out a program or project, which will cause a resident to become a displaced person. Projects vary and, for any specific task described in this Notice, may require substituting in a reference to a party that is more appropriate for a specific project.

² The content of this Notice should not be relied upon in carrying out any other activities funded under any other HUD program, except where specifically directed by HUD.

³ The "first component" of RAD allows public housing and Moderate Rehabilitation properties to convert assistance; the "second component" refers to conversion of Rent Supplement, Rental Assistance Payment, and Moderate Rehabilitation properties upon contract expiration or termination.

⁴ Relocation concerns and URA requirements apply to both components of RAD. This notice provides guidance only as to the first component.

Relocation assistance provided pursuant to public housing and RAD requirements is broader than URA relocation assistance requirements. Not all specific situations requiring relocation under RAD may trigger URA assistance requirements. In addition, whereas all qualifying residents⁵ of a converting public housing project are eligible for relocation assistance under RAD, some residents or household members may not meet the statutory and regulatory requirements for eligibility under URA. This Notice supersedes PIH Notice 2012-32 (HA), REV-1, with respect to relocation matters. This Notice also specifically addresses when relocation may begin (see Section 9 below). As necessary, the Department will issue additional guidance on relocation issues and requirements as they relate to RAD.

2. Background

RAD allows public housing properties to convert assistance to long-term project-based Section 8 contracts. In many cases, a RAD project may require relocation of residents when properties undergo repairs, are demolished and rebuilt, or when the assistance is transferred to another site. PIH Notice 2012-32 REV-1 (see also FR Notice 5630-N-05, 78 FR 39759-39763 (July 2, 2013)) details RAD program requirements.

The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, (URA) is a federal law that establishes minimum standards for federally-funded programs and projects that include the acquisition of real property (real estate) and/or displace persons from their homes, businesses, or farms as a result of acquisition, rehabilitation, or demolition of real property.⁶ The URA will apply to acquisitions of real property and relocation of persons from real property that occurs as a direct result of acquisition, rehabilitation, or demolition for a project that involves conversion of assistance to Project-Based Voucher (PBV) or Project-Based Rental Assistance (PBRA) programs under RAD.

Additionally, all relocation conducted as part of a RAD conversion and all relocation assistance provided under URA must be consistent with applicable fair housing and civil rights laws, including, but not limited to, the Fair Housing Act, Title VI of the Civil Rights Act of 1964, and Section 504 of the Rehabilitation Act of 1973.

Because each RAD proposal varies in its scope, this Notice may not address each PHA's specific circumstances. RAD PHAs and participants should carefully review the regulations, notices, and guidance material referenced in this Notice. Any questions related to the applicability of these requirements should be referred to the RAD Transaction Managers (TM) or may be emailed to rad@hud.gov.

3. Applicable Legal Authorities

⁵ The term "resident" as used in this Notice refers to eligible resident families of public housing residing in a property applying for participation in RAD or a property that undergoes a conversion of assistance through RAD.

⁶ HUD Handbook 1378 (Tenant Assistance, Relocation, and Real Property Acquisition), available at: http://portal.hud.gov/hudportal/HUD?src=/program_offices/comm_planning/library/relocation/policyandguidance/handbook1378.

- RAD: Consolidated and Further Continuing Appropriations Act of 2012 (Public Law 112-55, approved November 18, 2011), with the implementing PIH Notice 2012-32, REV-1
- URA statute and implementing regulations: 49 CFR part 24
- FHEO: Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, Fair Housing Act
- Section 104(d) of the Housing and Community Development Act of 1974, statute and implementing regulations (if CDBG and/or HOME funds are used): 24 CFR part 42, subpart C

4. Relocation Planning

If there is a possibility that residents will be relocated as a result of acquisition, demolition, or rehabilitation for a project converting under RAD, PHAs must undertake a planning process in conformance with URA in order to minimize the adverse impact of relocation (49 CFR 24.205(a)).

While a written Relocation Plan is not a requirement under RAD or URA, the Department strongly encourages PHAs to prepare a written Relocation Plan, both to establish their relocation process and to communicate this process consistently and effectively to all relevant stakeholders. Appendix 1 contains recommended elements of a Relocation Plan.

The following presents a general sequencing of relocation planning activities within the RAD milestones:

Stage	Activities
1. Prior to submission of RAD application	• Determine potential need for relocation • Meet with residents to discuss plans, communicate right to return, and solicit feedback • Provide <i>General Information Notice</i> (GIN) to residents • Survey residents to prepare Relocation Plan and relocation process cost estimate
2. After receipt of the Commitment to Enter into a HAP Contract (CHAP) Award	• Prepare Significant Amendment to PHA Plan • Assess and refine need for relocation • Develop a Relocation Plan (See Appendix 1 for recommended content) • Identify relocation housing options
3. Preparing Financing Plan (due to RAD Transaction Manager no later than 180 days following	• Budget for relocation expenses • Submit FHEO Accessibility & Relocation checklist (PHAs may submit Relocation Plan along with checklist)

Stage	Activities
CHAP award)	
4. Receipt of RAD Conversion Commitment (RCC)	• The date of issuance of the HUD RCC marks the date of "Initiation of Negotiations" (ION), as defined in the URA (49 CFR 24.2(a)(15)) • Provide residents with appropriate notice informing them if they will be relocated and any associated relocation assistance • Meet with residents to describe approved conversion plans and discuss required relocation
5. Closing/RAD conversion	• Generally, resident relocation should not begin until after the date of closing/conversion of assistance under RAD • PHAs must adhere to notification requirements (described in Paragraph 8 of this Notice): generally, a minimum of 30 days for residents to be temporarily relocated for up to a year, and 90 days for permanent relocation • PHAs seeking to move residents prior to closing must receive prior approval from HUD as described in Paragraph 9 of this Notice

5. Resident Right to Return

RAD program rules prohibit the permanent involuntary relocation of residents as a result of conversion. Residents that are temporarily relocated retain the right to return to the project once it has been completed and is in decent, safe, and sanitary conditions.⁷ The period during which residents may need to be temporarily relocated is determined by the period of rehabilitation or construction, which will be specific to each project.

If proposed plans for a project would preclude a resident from returning to the RAD project, the resident must be given an opportunity to comment and/or object to such plans. If the resident objects to such plans, the PHA must alter the project plans to accommodate the resident in the converted project. If a resident agrees to such plans, the PHA must secure informed, written consent from the resident to receive permanent relocation assistance and payments consistent with URA and acknowledge that acceptance of such assistance terminates the resident's right to return to the project. In obtaining this consent, PHAs must inform residents of their right to return, potential relocation, and temporary and permanent housing options at least 30 days before residents must make a decision. The PHA cannot employ any tactics to pressure residents into

⁷ Where the transfer of assistance to a new site is approved, residents of the converting project will have the right to reside in an assisted unit at the new site once rehabilitation or new construction is complete.

relinquishing their right to return or accepting permanent relocation assistance and payments.⁸ A PHA may not terminate a resident's lease if it fails to obtain this consent.

PHAs must keep documentation of such information provided to residents and such consent by residents. While HUD does not require PHAs to submit documentation of obtaining this consent, PHAs and participants must properly brief residents on their housing and relocation options and must keep auditable written records of such consultation and decisions. HUD may request this documentation during a review of the FHEO Relocation and Accessibility Checklist or if relocation concerns arise.

Examples of project plans that may preclude a resident from returning to the converted RAD project include, but are not limited to:

- Changes in bedroom distribution (i.e. when larger units will be replaced with smaller units such that current residents would become under-housed or when smaller units will be replaced with larger units such that current residents would become over-housed);
- Where a PHA is reducing the number of assisted units at a property by a de minimis amount⁹, but those units are occupied by assisted residents; or
- The reconfiguration of efficiency apartments, or the repurposing of dwelling units in order to facilitate social service delivery.

In all scenarios where residents voluntarily accept permanent relocation to accommodate project plans, these residents are eligible for permanent relocation assistance and payments under URA. If a resident accepts permanent relocation assistance, the resident surrenders his or her right to return to the completed project.

6. Relocation Assistance

Under RAD, relocation assistance may vary depending on the length of time relocation is required.¹⁰

- a. In instances when the PHA anticipates that a resident will be relocated for more than a year, the PHA must offer the resident the choice of:
 - Permanent relocation assistance and payments at URA levels; or
 - Temporary relocation assistance, including temporary housing, while the resident retains his or her right to return and reimbursement for all reasonable out-of-pocket expenses associated with the temporary relocation.

⁸ Persons with disabilities returning to the RAD project may not be turned away or placed on a waiting list due to a lack of accessible units. Their accessibility needs must be accommodated.

⁹ A reduction in total number of assisted units at RAD project of 5% or less. (Section 1.5.B of PIH 2012-32 REV-1)

¹⁰ Some residents may not qualify for relocation assistance under URA. A nonexclusive listing of persons who do not qualify as displaced persons under URA is at 49 CFR 24.2(a)(9)(ii). See also, Paragraph 1-4(J) of HUD Handbook 1378.

The PHA must give the resident no less than 30 days to decide between permanent and temporary relocation assistance. If the resident elects to permanently relocate with assistance at URA levels, the PHA must inform the resident that his or her acceptance of permanent relocation assistance terminates the resident's right to return to the completed RAD project.

- b. In instances when a resident elects temporary relocation assistance and reoccupies a unit in the completed project within one year, the resident need not be offered permanent relocation assistance pursuant to URA.

Great care must be exercised to ensure that residents are treated fairly and equitably. If a resident is required to relocate temporarily in connection with the project, his or her temporarily occupied housing must be decent, safe, and sanitary and the resident must be reimbursed for all reasonable out-of-pocket expenses incurred in connection with the temporary relocation. These expenses include, but are not limited to, moving expenses and increased housing costs during the temporary relocation.

- c. In the event that a resident elects to receive temporary relocation assistance and the temporary relocation exceeds one year, the resident becomes eligible for all permanent relocation assistance and payments under URA. (This assistance would be in addition to any assistance the person has already received for temporary relocation, and may not be reduced by the amount of any temporary relocation assistance.) In such event, the PHA shall give the resident the opportunity to choose to remain temporarily relocated for an agreed-to period (based on new information about when they can return to the completed RAD unit), or choose to permanently relocate with URA assistance.

PHAs may not propose or request that a displaced person waive rights or entitlements to relocation assistance under the URA. If the resident elects to permanently relocate with URA assistance, the PHA must inform the person that the person's acceptance of URA relocation assistance to permanently relocate will terminate the person's right to return to the completed RAD project. Conversely, unless and until the resident elects to be permanently relocated, the resident may remain temporarily relocated with a right to return to the completed project.

7. Initiation of Negotiations (ION) Date

Eligibility for URA relocation assistance is generally effective on the date of initiation of negotiations (ION) (49 CFR 24.2(a)(15)). For RAD projects, the ION date is the date of the issuance of the RAD Conversion Commitment (RCC).

8. Resident Notification

When a project converting under RAD will include relocation of residents, notice must be provided to those resident households. For each notice listed below, one notice shall be given to each resident household. The purpose of these notifications is to ensure that residents are

informed of their potential rights and the relocation assistance available to them. During initial meetings with residents about RAD and in subsequent communications with residents related to relocation, the PHA should inform residents that if they choose to move after receiving a written GIN, but prior to receiving a RAD Notice of Relocation, they may jeopardize their eligibility for relocation assistance. However, PHAs should note that a resident move undertaken as a direct result of the project may still require relocation assistance and the resident may be eligible to receive permanent relocation assistance under the URA even though the PHA has not yet issued notices.

a. *General Information Notice* (49 CFR 24.203(a) & Handbook 1378, Paragraph 2-3(B))

As soon as feasible in the planning process, the PHA must provide each resident with a written GIN (see sample in Appendix 2) to provide a general description of the project, the activities planned, and the relocation assistance that may become available. URA regulations state that the GIN should be provided *as soon as feasible*. Under RAD, PHAs must provide GINs during the initial RAD resident meetings, before submitting a RAD application. GINs must do at least the following:

- Inform the resident that he or she may be displaced for the project and generally describe the relocation payment(s) for which the resident may be eligible, the basic conditions of eligibility, and the procedures for obtaining the payment(s);
- Inform the resident that he or she will be given reasonable relocation advisory services, including referrals to replacement properties, help in filing payment claims, and other necessary assistance to help the resident successfully relocate;
- Inform the resident that, if he or she qualifies for relocation assistance as a displaced person under the URA, he or she will not be required to move without at least 90 days advance written notice, and inform any person to be displaced from a dwelling that he or she cannot be required to move permanently unless at least one comparable replacement dwelling has been made available;
- Inform the resident that any person who is an alien not lawfully present in the United States is ineligible for relocation advisory services and relocation payments, unless such ineligibility would result in exceptional and extremely unusual hardship to a qualifying spouse, parent, or child (see 49 CFR 24.208(h) for additional information); and
- Describe the resident's right to appeal the PHA's determination as to a person's eligibility for URA assistance.

b. *RAD Notice of Relocation*

If a resident will be relocated to facilitate the RAD conversion, the PHA shall provide notice of such relocation (RAD Notice of Relocation). The PHA shall issue this notice upon the PHA's receipt of the RCC from HUD, which is the ION date.

If residents will not be relocated, notice of relocation is not required, but the PHA should

notify them that they are not being relocated.¹¹

The RAD Notice of Relocation must conform to the following requirements:

- The notice must state the anticipated duration of the resident's relocation.
- PHAs must provide this notice a minimum of 30 days prior to relocation to residents who will be temporarily relocated.¹² Longer notice may be appropriate for persons who will be relocated for an extended period of time (over 6 months), or if necessary due to personal needs or circumstances.
- Residents whose temporary relocation is anticipated to exceed one year must be informed that they will have no less than 30 days to elect temporary or permanent relocation as described in Section 6 of this Notice. When timing is critical for project completion, the 30-day decision period can run concurrently with the 30-day notice period for temporary relocation and with the 90-day period for permanent relocation if the PHA makes available comparable replacement dwellings consistent with 24.204(a).
- Residents who will be permanently relocated must receive written notice a minimum of 90 days prior to relocation. This 90-day time period may only begin once the PHA has made available at least one comparable replacement dwelling consistent with 49 CFR 24.204(a).¹³
- The notice must describe the available relocation assistance, the estimated amount of assistance based on the individual circumstances and needs, and the procedures for obtaining the assistance. The notice must be specific to the resident and his or her situation so that the resident will have a clear understanding of the type and amount of payments and/or other assistance the resident household may be entitled to claim.
- The notice must explain the reasonable terms and conditions under which the resident may continue to lease and occupy a unit in the completed project.
- The notice must state that the PHA will reimburse the resident for all reasonable out-of-pocket expenses incurred in connection with any temporary move. These expenses include, but are not limited to, moving expenses and increased housing costs (rent, utilities, etc.).

c. Notice of Intent to Acquire (49 CFR 24.203(d))

¹¹ HUD policy generally requires a "notice of non-displacement" in certain instances; the RAD program does not require this notice. Although the scope of this notice is limited to guidance for projects requiring relocation, PHAs should note, however, that there may be notification requirements for projects that do not involve relocation. The RAD conversion will terminate the resident's public housing lease and commence a PBV or PBRA lease, even when there is no relocation required. In such instances, state law may impose certain notification requirements. In addition, public housing regulations generally require 30 days' notice prior to lease termination. PHAs are encouraged to review public housing requirements set forth in 24 CFR parts 5 and 966.

¹² HUD may approve shorter notice periods based on an urgent need due to danger, health, or safety issues or if the person will be temporarily relocated for only a short period.

¹³ PHAs should note that URA regulations also require, where possible, that three or more comparable replacement dwellings be made available before a resident is required to move from his or her unit.

For RAD projects involving acquisition, residents may be provided with a notice of intent to acquire ("*Notice of Intent to Acquire*") prior to the ION date with HUD's prior approval. Once the Notice of Intent to Acquire is provided, a resident's eligibility for relocation assistance and payments is established. Therefore, the RAD Notice of Relocation must be provided in conjunction with or after the Notice of Intent to Acquire. A RAD Notice of Relocation would not otherwise be sent prior to the ION date.

Since residents who accept permanent relocation must receive 90 days advanced written notice prior to being required to move, providing residents the Notice of Intent to Acquire and RAD Notice of Relocation prior to the ION date may be necessary to provide sufficient notice of relocation to a resident in instances where there may not be 90 days between the issuance of the RCC (ION date) and the anticipated closing date. This allows the PHA to issue the notice earlier so that relocation may begin upon closing. This allows program participants to conduct orderly relocation upon closing, minimize adverse impacts on displaced persons, and to expedite project advancement and completion.¹⁴

d. *URA Notice of Relocation Eligibility – for residents whose temporary relocation exceeds one year (49 CFR 24.203(b) & Handbook 1378, Paragraph 2-3(C))*

After a resident has been temporarily relocated for one year, the PHA must provide a notice of relocation eligibility in accordance with URA requirements ("*Notice of Relocation Eligibility*"). This notice is not required if the resident has already accepted permanent relocation assistance.

The Notice of Relocation Eligibility must conform to URA requirements as set forth in 49 CFR Part 24, to HUD Handbook 1378 and to the following requirements:

- The PHA must provide updated information as to when it is anticipated that the resident will be able to return to the completed project.
- The resident may choose to remain temporarily relocated based upon such updated information or may choose to accept permanent URA relocation assistance in lieu of exercising the right to return.
- If the resident chooses to accept permanent URA relocation assistance and such assistance requires that the resident move, the URA requires such resident to receive 90 days advance written notice of the earliest date they will be required to move (i.e., 90-Day Notice, 49 CFR 24.203(c)). The PHA should be mindful that the 90-day time period may only begin once the PHA has made available at least one "comparable replacement dwellings" as set forth in 49 CFR 24.204(a).

9. Initiation of Relocation

¹⁴ PHAs and program participants should note that, in most instances, it will be most appropriate for the acquiring entity to send this notice.

Unless otherwise approved by HUD, relocation may not begin until the date of closing of the RAD transaction and recordation of the RAD Use Agreement. PHAs must provide residents being temporarily relocated at least 30 days advance written notice of the required move. PHAs must give residents being permanently relocated at least 90 days advance written notice of the required move. This means PHAs are advised to plan carefully to account for this 30-day or 90-day notice period to ensure the closing is not delayed.

However, HUD is aware that, in rare cases, some project plans necessitate relocation prior to closing. With prior HUD approval, for projects involving acquisition, PHAs may relocate residents prior to the closing date subject to public housing requirements (see 24 CFR part 5 and 24 CFR 966). PHAs must contact their assigned RAD transaction manager (TM) to discuss plans as early as possible in the process to ensure compliance with all RAD and URA requirements.

If relocation prior to closing is desired, PHAs should submit to the TM the following information, as early as possible in the process:

- A written request for relocation prior to closing. The request must include justification of why the early relocation is necessary for the viability of the RAD transaction. Justification may include the presence of outside financing, such as Low Income Housing Tax Credit (LIHTC) awards, if the PHA can show that early relocation is necessary to meet critical LIHTC deadlines.
- FHEO Accessibility and Relocation Checklist.
- Evidence of intent to comply with public housing requirements, as applicable. Generally, public housing regulations require public housing residents to receive 30 days' notice prior to relocation and that such notice either be published in the PHA's admissions and continued occupancy policies (ACOP) or published elsewhere at least 30 days prior to receipt of such notice (24 CFR parts 5 and 966).

When seeking to relocate residents prior to closing, submission of this request as early as possible is preferred, prior to the 180-day Financing Plan milestone if possible (with Financing Plan submission following the request).

HUD reserves the right to request additional follow-up information, including a Relocation Plan and related budget, prior to approving such requests. PHAs must receive written HUD approval before beginning relocation of residents prior to closing.

Early planning and submission of the Financing Plan and FHEO checklist to HUD will ensure the PHA has built in the 30- or 90-day notice period prior to initiating relocation.

10. Fair Housing and Civil Rights Requirements

PHAs must comply with all applicable fair housing and civil rights laws, including, but not limited to, the Fair Housing Act, Title VI of the Civil Rights Act of 1964, and Section 504 of the Rehabilitation Act of 1973, when conducting relocation planning and providing relocation assistance. Further, communication must be provided in a manner that is effective for persons

with disabilities (24 CFR 8.6) and for person who are Limited English Proficient (see 72 FR 2732). This section discusses some of the PHA's obligations under these laws and regulations. However, the applicability of civil rights laws is not limited to the activities discussed in this section. PHAs conducting relocation activities should familiarize themselves with applicable civil rights statutes, regulations, and guidance, including but not limited to, those listed at the end of this section.

- **Effective Communication for Persons with Disabilities:** Communications and materials must be provided in a manner that is effective for persons with hearing, visual, and other communication-related disabilities consistent with Section 504 of the Rehabilitation Act of 1973 (24 CFR 8.6), and as applicable, the Americans with Disabilities Act; and for persons who are limited English proficient (*see* 72 Fed Reg 2732). This includes ensuring that training materials are in appropriate alternative formats as needed, e.g., Braille, audio, large type, assistive listening devices, and sign language interpreters.
- **Accessible Meeting Facilities for Persons with Disabilities:** When holding public meetings, PHAs must give priority to methods that provide physical access to individuals with disabilities, i.e., holding the meetings, workshops, and briefings or any other type of meeting in an accessible location, in accordance with the regulations implementing Section 504 of the Rehabilitation Act of 1973 and Titles II and III of the Americans with Disabilities Act of 1990, as applicable. All programs and activities must be held in accessible locations unless doing so would result in an undue financial and administrative burden, in which case the PHA must take any action that would not result in such an alteration or such burden but would nevertheless ensure that individuals with disabilities receive the benefits and services of the program or activity, e.g., briefings at an alternate accessible, in-home briefing. Individuals with disabilities must receive services in the most integrated setting appropriate to their needs. The most integrated setting appropriate to the needs of qualified individuals with disabilities is a setting that enables individuals with disabilities to interact with nondisabled person to the fullest extent possible (28 CFR part 35, appendix B).
- **Meaningful Access for Persons with Limited English Proficiency (LEP):** PHAs must provide meaningful access to programs and activities for persons who have a limited ability to read, speak, or understand English. Any person with LEP who will be temporarily relocated or permanently displaced must have meaningful access to any public meetings regarding the project. In addition, any information provided to residents including, but not limited to, any notices required under the URA, should be provided in the appropriate language to persons with LEP. Generally, PHAs will be responsible for providing oral interpreters at meetings, including ensuring their competence, and covering any associated translation and interpretation costs.
- **URA requires that PHAs provide persons who are unable to read or understand the notices,** such as persons with disabilities or persons with LEP, with appropriate translation and counseling to ensure that they understand their rights and responsibilities and the assistance available to them (49 CFR 24.5). URA also requires that each notice indicate the name and telephone number of a person to contact with questions or for other

needed help (49 CFR 24.5). This notice should include the number for the telecommunication device for the deaf (TDD) or other appropriate communication device, if applicable (24 CFR 8.6(a)(2)).

- **Comparable Housing for Persons with Disabilities:** PHAs should identify the accessibility needs of residents to be relocated by consulting existing information (e.g., tenant characteristics forms, including identification of the need for accessible unit features; records of approved reasonable accommodations, and records of the presence of accessible unit features). For guidance on providing relocation assistance to persons with disabilities, see Exhibit 3-1 in HUD Handbook 1378.
- **Advisory Services:** PHAs should determine the advisory services that will be necessary to ensure a successful relocation program consistent with 49 CFR 24.205(c). Such advisory services may include housing counseling that should be facilitated to ensure that residents affected by the project understand their rights and responsibilities and the assistance available to them (49 CFR 24.205(c)). Advisory counseling must also inform residents of their fair housing rights and be carried out in a manner that satisfies the requirements of Title VI of the Civil Rights Act of 1964, the Fair Housing Act, and Executive Order 11063 (49 CFR 24.205(c)(1)). In addition, PHAs should inform residents that if they believe they have experienced unlawful discrimination, they may contact HUD at 1-800669-9777 (Voice) or 1-800-927-9275 (TDD) or at <http://www.hud.gov>.

Fair Housing References:

- Section 504 of the Rehabilitation Act of 1973
 - Regulations: 24 CFR part 8
 - Fair Housing Act Regulations: 24 CFR part 100
 - Title VI of the Civil Rights Act of 1964
 - Regulations: 24 CFR part 1
 - Final Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons (LEP Guidance) (72 FR 2732)
 - Exhibit 3-1 Compliance with Section 504 of the Rehabilitation Act in HUD Handbook 1378 (Tenant Assistance Relocation and Real Property Acquisition)
-

11. Other Requirements

a. Public Housing Program Compliance

PHAs should note that public housing resident provisions related to occupancy and termination, including grievances and related hearings, will remain in effect until the execution of the new PBV or PBRA Housing Assistance Payment (HAP) contract.

b. Evictions for Cause

If the PHA determines that a resident was evicted in accordance with applicable state and local law for serious or repeated violation of material terms of the lease, and the eviction was not undertaken for the purpose of evading the obligation to make available URA payments and other assistance, the resident is not entitled to relocation payments and assistance under the URA (49 CFR 24.206).

Jemine A. Bryon
General Deputy Assistant Secretary
for Public and Indian Housing

Carol J. Galante, Assistant Secretary for
Housing-Federal Housing Commissioner

APPENDICES

Appendix 1

Recommended Relocation Plan Contents

Appendix 2

Sample RAD General Information Notice (GIN)

Appendix 3

Sample RAD Notice of Relocation (for relocation anticipated for a year or less)

Appendix 4

Sample RAD Notice of Relocation (for relocation anticipated for more than a year)

Appendix 5

Sample Notice of Eligibility for URA Relocation Assistance (for residents who have been temporarily relocated for more than a year)

Appendix 1: RECOMMENDED RELOCATION PLAN CONTENTS

While written Relocation Plans are not required under RAD or URA, the Department strongly encourages PHAs to document their relocation planning process and procedures in a written Relocation Plan. The following provides suggested content for Relocation Plans.

I. Project Summary

The Relocation Plan should provide a general description of and purpose for the project (e.g., year built, location, number of units, configuration, occupancy information, and funding sources).

The basic components of a plan include:

- A general description of the project and the site, including acquisition, demolition, rehabilitation, and construction activities and funding sources;
- A detailed discussion of the specific steps to be taken to minimize the adverse impacts of relocation, including when transferring the assistance to a new site;
- Information on occupancy (including the number of residents, residential owner-occupants and non-residential occupants, if any, to be permanently or temporarily relocated);
- Information on relocation needs and costs (including the number of residents who plan to relocate with Section 8 assistance);
- General moving assistance information;
- Temporary move assistance (including information on the duration of temporary moves);
- Permanent move assistance; and
- Appeals process.

II. Resident Return and Re-occupancy Policies

For residents that will be temporarily relocated, the plan should include the criteria that will be used to determine the priority for residents to re-occupy units at the project after rehabilitation, demolition, and/or construction is completed. For example, if units will come online in stages, the plan should outline how the PHA will determine when each resident will return to the project. PHAs should ensure that any written return or re-occupancy policy is compliant with related RAD requirements, such as the right-to-return policy and the “no re-screening upon conversion” policy, as described in the RAD Notice.

III. Summary of Moving Costs

The plan should include a summary of moving costs, identified by move types, including the following:

Temporary Moves

- Number of and cost amount for two-way moves (i.e., a move to another unit and then a return move) within the same building/complex.
- Number of and cost amount for two-way moves to a unit not in the same building/complex, carried out by the PHA.
- Number of and cost amount for two-way moves to a unit not in the same building/complex not carried out by the PHA.

Permanent Moves

- Number of and cost amount for one-time moves into another unit in the same building/complex.¹⁵
- Number of and cost amount for one permanent move to a unit not within the same building/complex, carried out by the PHA.

PHAs should note that if a residential move is carried out by the PHA at no cost to the resident, this per-household estimate must include the required dislocation allowance (currently \$100). The URA Fixed Residential Moving Cost Schedule lists the most current dislocation allowance:

http://www.fhwa.dot.gov/real_estate/practitioners/uniform_act/relocation/moving_cost_schedule.cfm

- Number of and cost amount for one permanent move to a unit not within the same building/complex that is not carried out by the PHA.

IV. Temporary Relocation Assistance

The PHA will assist residents who are required to move temporarily. At the Initiation of Negotiations (ION), the PHA will send a RAD Notice of Relocation to residents who will be relocated. Appendices 3 and 4 of this Notice contain sample RAD Notices of Relocation to be provided to residents that will be temporarily relocated.

The plan should detail the temporary relocation assistance the PHA will provide for residents (Paragraph 2-7 of HUD Handbook 1378). This assistance includes:

- Temporary Housing - The PHA will provide temporary housing that is decent, safe, and sanitary on a nondiscriminatory basis for residents who are relocated temporarily. The PHA will also pay for reasonable increased housing costs that the resident incurs in connection with the temporary relocation.

NOTE: If a resident's relocation exceeds one year, the PHA must then issue a *Notice of Relocation Eligibility* (49 CFR 24.203(b)) to the resident and offer the resident permanent

¹⁵ A resident who moved to another unit in the same building/complex may be considered a displaced person under URA if the resident moves from the building/complex permanently and was not offered reimbursement for all reasonable out-of-pocket expenses incurred in connection with the move within the same building/complex and/or if other conditions of the move within the building/complex were not reasonable.

relocation assistance and payments at URA levels. The PHA must provide this notice to affected residents as soon as the temporary relocation exceeds one year.

- **Packing and Moving Assistance** - Since most residents prefer to pack their own personal possessions and items of value, they should be provided packing instructions, boxes, markers, and tape for the move. If assistance in packing is needed, the PHA should provide the resident with information on how to request this assistance. The PHA is responsible for covering all reasonable moving expenses incurred in connection with temporarily relocating a resident. The PHA may reimburse the resident's out-of-pocket moving expenses and/or directly carry out the move.
- **Payment for Temporary Relocation Moving Expenses** - The plan should also indicate how the PHA intends to provide or reimburse for moving services and expenses. The PHA can choose to do one or more of the following:
 - Undertake the moves itself, using force account labor or a moving company;
 - Use PHA's contractor or moving company;
 - Carry out moves with employees of the PHA;
 - Reimburse residents for all actual and reasonable moving costs.

NOTE: The PHA will not make fixed payments since such payments may not be representative of actual reasonable costs incurred. However, in order for a resident to be sure of full reimbursement, the resident should submit a moving cost estimate to the PHA for approval prior to the move unless the PHA is directly carrying out the move and the resident will not incur any reasonable out-of-pocket moving expenses. Failure to do so may result in the resident not being fully reimbursed.

- **Utility Costs** - The PHA is responsible for covering the expenses relating to disconnection and reconnection of necessary utilities. If the resident has telephone, cable service or Internet access, the PHA is responsible for covering the expenses involved in transferring existing service. The PHA may also pay utility deposits, if required at the temporary relocation housing (HUD Handbook 1378, paragraph 2-7(A)(3)). If a resident is temporarily relocating from a public housing unit to a non-public housing unit, the resident must be reimbursed for reasonable increases in utility costs even if the PHA utility allowance is lower than the actual costs to the resident.

V. Permanent Relocation Assistance

Based on the local housing resources available, the PHA should identify the replacement housing options that will be available to meet the housing needs of residents to be permanently relocated. Replacement housing options for residents that meet the definition of a "displaced person" (49 CFR 24.2(a)(9)) under the URA include, but are not limited to:

- Other Public Housing;
- Section 8 Project-Based Voucher unit;
- Section 8 Housing Choice Voucher unit;
- Homeownership housing;

- Private-market rental housing (affordable, non-subsidized).¹⁶

The plan should describe each type of replacement housing projected to be available, including:

1. Number of units, by bedroom size, expected to be available, and discussion of whether available units will meet dwelling requirements of relocated residents;
2. General area or location of unit(s);
3. Criteria for receiving relocation assistance; and
4. Any other information that might benefit residents in their consideration of housing choices.

The plan should include a description of the permanent relocation assistance the PHA will provide to residents. This assistance includes:

- Availability of Comparable Replacement Housing -- Under URA, no displaced resident will be required to move unless at least one comparable replacement dwelling (49 CFR 24.2(a)(6)) is made available at least 90 days before the required move (49 CFR 24.203(c)). Comparable replacement dwellings must contain the accessibility features needed by displaced persons with disabilities (49 CFR 24.2(a)(8)(vii); 49 CFR part 24, Appendix A, §24.2(a)(8)(vii)). If the comparable replacement dwelling is not subsidized housing, the PHA should contact the RAD staff for advice on replacement housing payment requirements.
- Referral to Housing Not Located in an Area of Minority Concentration - Whenever possible, minority persons shall be given reasonable opportunities to relocate to decent, safe, and sanitary replacement dwellings that are within their financial means and not located in areas of minority concentration (49 CFR 24.205(c)(2)(ii)(D)). However, this policy does not require a PHA to provide a person a larger payment than is necessary to enable a person to relocate to a comparable replacement dwelling unit.
- Permanent Relocation Moving Expenses from Public Housing to Public Housing - The PHA may choose one of the following options for covering the expenses involved in moving public housing residents that are relocated into other public housing:
 - Undertake the move itself, using force account labor or a moving company. Residents should incur no moving costs under this option, but if such expenses are incurred, the PHA is responsible for reimbursing the resident for any such actual and reasonable expenses. In such case, the resident is also entitled to a dislocation allowance (currently \$100). The URA Fixed Residential Moving Cost Schedule lists the current dislocation allowance and is available at:
[http://www.fhwa.dot.gov/real estate/practitioners/uniform act/relocation/moving cost schedule.cfm](http://www.fhwa.dot.gov/real%20estate/practitioners/uniform%20act/relocation/moving%20cost%20schedule.cfm)

¹⁶ Every effort should be made to find another subsidized unit as replacement housing for a resident relocating from subsidized housing so that the resident will continue receiving the housing subsidy as long as it is needed.

NOTE: Residents who prefer to pack their own personal possessions and items of value may be provided packing instructions, boxes, markers, and tape for their move. If a resident needs assistance in packing, they should contact the PHA. It is the responsibility of the PHA to pack and move all of their belongings and household goods, if so desired.

☐ Allow the resident to elect one of the following choices:

1) The PHA will reimburse the resident for the cost of all actual reasonable and necessary moving and related expenses (49 CFR 24.301), such as:

- Transportation of the resident and personal property. This may include reimbursement at the current mileage rate for personally owned vehicles that need to be moved. Transportation costs for a distance beyond 50 miles are not eligible, unless the PHA determines that relocation beyond 50 miles is justified.
- Packing, crating, uncrating, and unpacking of personal property.
- Storage of personal property for a period not to exceed 12 months, unless the PHA determines that a longer period is necessary.
- Disconnecting, dismantling, removing, reassembling, and reinstalling relocated household appliances and other personal property.
- Insurance for the replacement value of the property in connection with the move and necessary storage.
- The replacement value of property lost, stolen, or damaged in the process of moving (not through the fault or negligence of the displaced person, his or her agent, or employee) where insurance covering such loss, theft, or damage is not reasonably available.

2) The PHA will pay directly to the resident the applicable and current fixed moving cost payment according to the URA Fixed Residential Moving Cost Schedule (49 CFR 24.302), available at:

http://www.fhwa.dot.gov/real_estate/practitioners/uniform_act/relocation/moving_cost_schedule.cfm

☐ Permanent Relocation Moving Expenses for All Other Moves – Under URA, residents who are permanently displaced, except for those residents displaced from public housing and moving to other public housing, are entitled to the assistance described in the brochure *Relocation Assistance To Residents Displaced From Their Homes*, available in English at http://portal.hud.gov/hudportal/documents/huddoc?id=DOC_16280.doc and in Spanish at http://portal.hud.gov/hudportal/documents/huddoc?id=DOC_16281.doc. Residents may choose moving assistance from one of the following two options.

1) The PHA will reimburse the resident for the cost of all actual reasonable moving and related expenses (49 CFR 24.301).

2) The PHA will pay directly to the resident the applicable and current fixed moving cost payment according to the URA Fixed Residential Moving Cost Schedule (49

CFR 24.302), available at:

[http://www.fhwa.dot.gov/real estate/practitioners/uniform act/relocation/moving cost schedule.cfm](http://www.fhwa.dot.gov/real%20estate/practitioners/uniform%20act/relocation/moving%20cost%20schedule.cfm).

- Replacement Housing Payment - In addition to covering moving expenses, displaced residents may be entitled to a replacement housing payment (RHP). This payment is intended to cover the increase, if any, in monthly housing costs for a 42-month period.

When calculating the RHP, the PHA must consider the comparable replacement housing unit offered to the resident. Since the PHA is not required to pay an RHP amount that exceeds the amount of RHP calculated for the offered comparable replacement dwelling, residents are cautioned to work closely with the PHA prior to their move.

- Accessible Housing for Persons with Disabilities - Under the URA, persons with disabilities who will be permanently displaced must be relocated to a replacement dwelling that contains the accessibility features they need (49 CFR 24.2(a)(8)(vii); 49 CFR Appendix A, 24.2(a)(8)(vii)). A person with disabilities who has been relocated must be offered a comparable replacement dwelling unit that contains accessible features comparable to the housing from which the tenant has been displaced or relocated. This is so even if the tenant has paid for the acquisition and/or installation of accessible features in the housing from which he or she has been relocated; in such instances, the recipient must ensure that the replacement housing contains comparable accessible features or provide relocation assistance to the tenant in an amount that covers the cost of acquiring and/or installing comparable accessible features. Under the URA, an agency may use project funds to remove architectural barriers for displaced owners and tenants with disabilities or take other last resort housing measures if comparable replacement dwelling units are not available within the monetary limits prescribed under the URA regulations (49 CFR 24.404(c)(vii); HUD Handbook 1378, Paragraph 3-8).

VI. Relocation Budget

Based on the results of the planning process, the PHA should create a relocation budget that includes the following six components:

- 1) The cost of administering the plan and providing assistance and counseling.
- 2) Reasonable moving expenses for a person with disabilities, which may include the cost of moving assistive equipment that is the personal property of the residents, the furnishings and personal belonging of a live-in aide, and/or other reasonable accommodations (HUD Handbook 1378, Paragraph 3-2).
- 3) The cost of the physical move of the residents' belongings. (It is suggested that the move costs be broken down by average cost per move type multiplied by the number of moves.)

NOTE: This physical move cost total should be based on the move scenarios anticipated

or projected by the resident survey.

- 4) The cost estimated to pay for projected increases in monthly housing costs for temporary relocation.
- 5) The cost estimated to pay for the replacement housing payment (RHP) (42-month period for URA or 60-month period if section 104(d) applies).
- 6) Contingency costs estimated for carrying out the relocation process necessary to complete the proposed project. (The PHA should state where these costs are indicated in the application, or attach any other information required by HUD, to support these costs.)

VII. Appeal Process

If a resident disagrees with the PHA's decision as to the resident's eligibility to receive relocation assistance, the amount of a relocation payment, or the adequacy of a comparable replacement dwelling offered to a resident, the resident may file a written appeal to the PHA. The Relocation Plan should describe the specific appeal procedures to be followed consistent with 49 CFR 24.10 (and 24 CFR 42.390 if section 104(d) is involved). At a minimum, the resident will have 60 days to file an appeal with the PHA after receiving written notification of a claim or ineligibility determination.

VIII. Certification

The plan should contain a certification of compliance with the URA and, if applicable, section 104(d).

Technical Assistance

The PHA should direct questions on this Notice's relocation assistance requirements to their RAD Transaction Manager or [email rad@hud.gov](mailto:rad@hud.gov).

Appendix 2: GENERAL INFORMATION NOTICE (GIN)

RENTAL ASSISTANCE DEMONSTRATION (RAD) GENERAL INFORMATION NOTICE (GIN)

July 15, 2021

Dear Tenant,

The property you currently occupy is being proposed for participation in the Department of Housing and Urban Development's (HUD) Rental Assistance Demonstration (RAD) program. At this time, we expect that the proposed acquisition, rehabilitation or demolition, may require you to be relocated (temporarily or permanently) from your unit. We will provide further details to you as plans develop. **This notice does not mean that you need to leave the property at this time. This is not a notice of eligibility for relocation assistance.** The remainder of this letter only applies to situations where you will need to be relocated from your unit.

This notice serves to inform you of your potential rights under the RAD program and a federal law known as the Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA). If the proposed RAD project receives HUD approval and if you are displaced permanently as a result, you may become eligible for relocation assistance and payments under the URA, including:

- 1) Relocation advisory services that include referrals to replacement properties, help in filing payment claims and other necessary assistance to help you successfully relocate;
- 2) At least 90 days' advance written notice of the date you will be required to move;
- 3) Payment for moving expenses; and
- 4) Payments to enable you to rent a similar replacement home.

NOTE: Aliens not lawfully present in the United States are not eligible for URA relocation assistance, unless such ineligibility would result in exceptional and extremely unusual hardship to a qualifying spouse, parent, or child as defined at 49 CFR 24.208(h). All persons seeking relocation assistance will be required to certify that they are a United States citizen or national, or an immigrant lawfully present in the United States.

As a resident of a property participating in RAD, you have the right to return to the project after the project is complete. You will be able to lease and occupy a unit in the converted project when rehabilitation is complete.

If you are permanently displaced from your home, you will not be required to move until you are given at least 90-day advance written notice of any required move and at least one comparable replacement dwelling has been made available to you. If you are temporarily relocated and your temporary relocation lasts more than one year, you will be contacted and offered permanent relocation assistance

as a displaced person under the URA. This assistance would be in addition to any assistance you may receive in connection with temporary relocation and will not be reduced by the amount of any temporary relocation assistance you have already received.

If you are required to relocate from the property in the future, you will be informed in writing. The Green Bay Housing Authority will inform you of what assistance and payments you are eligible for if you will be relocated because of RAD and how you will receive these payments. If you become a displaced person, you will be provided reasonable assistance necessary to complete and file any required claim to receive a relocation payment. If you feel that your eligibility for assistance is not properly considered, you will also have the right to appeal a determination on your eligibility for relocation assistance.

You should continue to pay your rent and meet any other requirements specified in your lease. If you fail to do so, the Green Bay Housing Authority may have cause for your eviction. If you choose to move, or if you are evicted, prior to receiving a formal notice of relocation eligibility, you may become ineligible to receive relocation assistance. It is very important for you to contact us before making any moving plans.

You will be contacted soon so that we can provide you with more information about the proposed project. If the project is approved, we will make every effort to accommodate your needs. In the meantime, if you have any questions about our plans, please contact:

Jayme Valentine
Housing Administrator
1424 Admiral Ct; Green Bay, WI 54303
jayme.valentine@greenbaywi.gov

This letter is important to you and should be retained.
Sincerely,

Jayme Valentine
Housing Administrator

RENTAL ASSISTANCE DEMONSTRATION PROGRAM (RAD)
RESIDENT INFORMATION NOTICE (RIN)

July 15, 2021

Dear Tenant:

You are invited to a resident meeting to talk about Green Bay Housing Authority's plans to convert Mason Manor from the public housing program to Section 8 rental assistance under the Rental Assistance Demonstration (RAD). There are three different meeting options, please sign up for ONE meeting. Sign up sheets are located on a clipboard outside the office on the first floor hallway.

Tuesday, July 20th, 2021, at 8:00AM

Thursday, July 22nd, 2021, at 11:30AM

Tuesday, July 27th, 2021, at 3:00PM

RAD is a voluntary program run by the U.S. Department of Housing and Urban Development (HUD). Under RAD, HUD will change the way it provides rental assistance to the property from public housing to a long-term Section 8 assistance contract. The Section 8 program would make it easier for us to access money to repair and improve the property, either now or in the future.

**This letter describes your rights under RAD and
explains how a RAD conversion might affect you.**

**Whether we participate in RAD or not,
you will still get rental assistance.**

Your Right to Information

With this letter, we have included "Attachment #1," which is a description of our current plans for the property. At the meeting, we will describe the RAD program and our current ideas in more detail. If we submit an application to HUD and are accepted into the program, we will have at least one additional meeting with you about our plans. You have the right to hear about major changes in the plans for the project, and we will invite you to additional meetings if key features of the plans change. You also have a right to organize and to form a resident organization to serve as your voice and to help you become well informed about the RAD plans.

Your Right to Rental Assistance

Our decision to participate in RAD does not affect your rental assistance eligibility. You are not subject to new eligibility screening. If we satisfy all HUD requirements and the property is placed under a Section 8 Housing Assistance Payment (HAP) contract, you have a right to ongoing rental assistance as long as you comply with the requirements of your lease. In most cases, your rent will not change with the conversion from public housing to Section 8. In the rare event that your rent calculation would change (most commonly, when you are paying a "ceiling rent/flat rate"), the increase would be phased in over time.

Your Right to Return

You have a right to return to an assisted unit once any construction work is done. However, we may need to move you during construction and your post-construction home may be a different unit than your current home. If the plans involve the transfer of the rental assistance to a different site, you may need to move to the new site to keep your rental assistance (provided that it is within a reasonable distance of your current home), but you still have a right to an assisted unit.

You get to return to a RAD Section 8 unit unless **you choose** to move somewhere else. If you believe the plans prevent you from exercising your right to return, you have the right to object to the plans. RAD program rules require us to make sure that anyone who wants to return can do so.

Your Right to Relocation Assistance

In some situations, we may need to relocate you from your unit temporarily in order to complete repairs or do construction. Since we are at the beginning of the planning process for the RAD conversion, we don't yet know whether you will need to move. You **do not** need to move now.

If we require you to move, you are entitled to certain relocation protections under the RAD rules, including, in all cases, advance written notice and detailed information about the move. The other specific relocation protections depend on the situation, but may include advisory services, moving assistance, payments and other assistance.

In some cases, you have additional rights under other Federal laws, such as the Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act, often referred to as the "Uniform Relocation Act." If the Uniform Relocation Act applies, we must give you a "General Information Notice" which is also referred to as a "GIN." To make sure we are complying with the Uniform Relocation Act, we are including the GIN with this letter. The GIN describes rights you have but may also describe situations that don't apply to you.

Don't Put Your Rights at Risk!

You are always welcome to move based on your household's needs and personal goals. However, if the RAD effort will require relocation and you choose to move from the property

on your own without waiting for instructions from us, you may lose your eligibility for relocation payments and assistance. **If you want to preserve your relocation rights, please wait until you get a Notice of Relocation and instructions to move from us!**

The RAD conversion, and any relocation associated with it, must be implemented consistent with fair housing and civil rights requirements. If you need a reasonable accommodation due to a disability, or have other questions about the RAD conversion, please contact Jayme Valentine, Housing Administrator, who will assist you. If you need to appeal a decision made by us, or if you think your rights aren't being protected, you may contact the US Housing and Urban Development Milwaukee Field Office at 414-297-3214.

Because we are very early in the process, the plans for the RAD conversion are likely to change. We are holding resident meetings to share our current ideas and will keep you informed about major changes to these ideas as we develop our plans. You should also share with us any information you have on repairs that need to be made, since you know the property best. We will give that information to the people who are helping us figure out what work needs to be done at the property.

We hope this letter gives you useful information about your rights. We are also including with this letter a list of frequently asked questions and answers that may help you understand the RAD program better. We encourage you to come to one of the resident meetings to learn more about how the RAD conversion would impact your property and you.

Sincerely,

Jayme Valentine
Housing Administrator
Green Bay Housing Authority

Attachments: Current Plans for the Property
 Frequently Asked Questions and Answers
 General Information Notice

Attachment #1
Current Plans for the Property

Note: These plans may change as we do more research. As we improve the plans, we will consider the following: your opinions; an independent professional's analysis of what needs to be repaired at the property; the cost to maintain the property for the long-term; and the financing we may be able to get.

The Green Bay Housing Authority initial plans are to update the major systems within Mason Manor including, but not limited, to the boiler system, hot water system, and elevators. We also hope to update the electrical and plumbing connections within the building and our big picture is to provide air conditioning, update all units and hallways and create better spaces for tenants to enjoy.

To complete this big project, the Green Bay Housing Authority is teaming up with Baker Tilly and a developer. Who the specific developer is unknown at this time.

Attachment #2 Frequently Asked Questions about RAD Conversions

Will a RAD conversion affect my housing assistance?

You will not lose your housing assistance and you will not be subject to eligibility re-screening as a result of the RAD conversion. You can remain in your unit regardless of your current income. However, your PHA will continue to follow its annual and interim re-examination processes, including re-examination of your income to adjust your rent. These requirements will be in your lease.

In a RAD conversion, your housing assistance will change from being public housing assistance to being Section 8 housing assistance under either the Project Based Voucher (PBV) program or the Project Based Rental Assistance (PBRA) program. The PHA chooses whether to convert the unit to PBV or PBRA.

Will a RAD conversion affect my rent?

Most residents will not have a rent increase as a result of a RAD conversion. However, if you are paying a flat rent in public housing, you will most likely have to pay more in rent over time. If your rent changes by more than 10% and requires you to pay more than \$25 per month in additional rent, your new rent will be phased in. If the increase in your rent is less than 10% or \$25 per month, the change in rent will be effective immediately.

How can I participate in the RAD planning process?

Prior to participating in RAD, HUD requires PHAs to:

- Notify all residents at the property about their RAD plans, and
- Conduct at least two (2) meetings with residents.

These meetings are an opportunity for you to discuss the proposed conversion plans with your PHA, ask questions, express concerns and provide comments. These meetings are also an opportunity to tell the PHA what you think needs to be repaired at the property. The PHA can then consider that information when developing plans for the property.

The PHA must have at least one more meeting with all residents of the property before HUD approves the final RAD conversion. This additional meeting is another opportunity for the PHA to keep you informed and for you to provide comments about the PHA's RAD conversion plans.

In addition to these resident meetings, your Resident Advisory Board (RAB) will also be consulted and have an opportunity to make recommendations on your PHA's RAD conversion plans during the PHA Plan public hearing process.

What if I need accommodations to participate?

Your PHA must make materials available in accessible formats for persons with disabilities and must make meetings accessible for persons with disabilities.

Your PHA must also provide language assistance to persons with limited English proficiency so that you can understand materials, participate in meetings, and provide comments on the proposed RAD conversion. This may include providing written translation of the PHA's written materials and providing oral interpreters at meetings.

Will I have to move if my home or building is rehabbed?

If the repairs planned at your property are small, you will most likely be able to stay in your home during renovation. If the repairs planned at your property are more extensive, you will most likely need to be relocated during rehabilitation. Even if you are required to move during the construction, you have a right to return to a RAD-assisted unit after construction is completed.

If relocation will last longer than 12 months, you benefit from additional protections as a "displaced person" under the Uniform Relocation Act. In this situation, you will be able to choose between the permanent relocation assistance that you are eligible for under the Uniform Relocation Act and the temporary relocation assistance (including the right to return) that you are eligible for under RAD. This is your choice and the PHA must work with you so you have the information you need to make this choice.

What changes will I see in my lease renewal process?

At the time of the RAD conversion, you will need to sign a new lease. Unless there is good cause for eviction based on your actions, your new lease will continue to renew. Under both the PBV and PBRA programs, a property owner who tries to end your lease must give you notice and grievance rights similar to the rights you have under public housing and the owner must follow state and local eviction laws.

Will RAD affect my rights and participation as a resident in the development?

RAD keeps many of the resident rights available under public housing such as the ability to request an informal hearing and the timeliness of termination notification. You also have a right to organize, and resident organizations will continue to receive up to \$25 per occupied unit each year.

Will RAD increase my ability to choose where I live?

In most cases, you will have greater choice in where to live through the RAD "choice mobility option." This option is available under PBV after living in a RAD property for one (1) year and under PBRA after living in a RAD property for two (2) years. After the required time living in the RAD property after conversion, you may request a Housing Choice Voucher (HCV) and will have priority on the HCV waiting list when an HCV is available.

Will I still be able to participate in self-sufficiency programs?

The public housing Family-Self-Sufficiency Program (PH FSS) helps families obtain and maintain living wage employment (income that covers a family's basic needs) by connecting residents to services. If you are a current participant in an FSS program, you will still be able to participate in FSS after the RAD conversion.

If your development converts to PBV, you will be automatically moved from the public housing FSS to the Housing Choice Voucher FSS program if your PHA has a Housing Choice Voucher FSS program. The rules for both public housing and Housing Choice Voucher FSS programs are very similar.

If your development converts to PBRA, you may continue your participation in FSS until your current contract of participation ends. New participants may enroll only if the owner voluntarily establishes an FSS program at the site.

The Resident Opportunities and Self Sufficiency-Service Coordinators Program (ROSS-SC) program provides public housing residents with coordinators to connect them to supportive services and empowerment activities.

If you are a current participant in the ROSS-SC, you can continue to participate in ROSS-SC until program funding is used up. Once the grant funds are spent, your PHA cannot apply for a new grant for a RAD property.

What if I need more information?

For more information, go to the RAD website, www.hud.gov/rad.

Appendix 3: SAMPLE RAD NOTICE OF RELOCATION (For relocation anticipated for a year or less)

***THIS IS A GUIDE FORM.
REVISE TO REFLECT THE PROJECT-SPECIFIC CIRCUMSTANCES.***

PHA Letterhead

(date)

Dear *[Resident Name]*,

The property you currently occupy is participating in the Department of Housing and Urban Development's (HUD) Rental Assistance Demonstration (RAD) program. On *[date]*, the *[Public Housing Authority]* (PHA) notified you of proposed plans to *[acquire/ rehabilitate/demolish]* the property you currently occupy at *[address]*. On *[date]*, HUD issued the RAD Conversion Commitment (RCC) and committed federal financial assistance to the project. *[In instances where a Notice of Intent to Acquire is applicable and this notice is being sent before the RCC is issued, in lieu of the previous sentence noting the RCC issuance date, insert: [Name of entity acquiring the property] (Displacing Agency) intends to acquire the property you currently occupy. This is a Notice of Intent to Acquire.]*

In order for PHA to complete the project, you will need to be relocated for *[anticipated duration of relocation]*. Upon completion of the project, you will be able to lease and occupy your present unit or another decent, safe and sanitary unit in the completed project under reasonable terms and conditions. You are eligible for relocation payments and assistance.

However, **you do not need to move now.** This notice informs you that a decent, safe, and sanitary dwelling unit, listed below, has been made available to you and you will be required to move by *[insert date at least 30 days after the date of this notice]*.

If your temporary relocation exceeds one year and you qualify as a "displaced person" under the Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA), you may be eligible for further relocation assistance and payments under URA.

NOTE: Aliens not lawfully present in the United States are not eligible for URA relocation assistance, unless such ineligibility would result in exceptional and extremely unusual hardship to a qualifying spouse, parent, or child as defined at 49 CFR 24.208(h). All persons seeking relocation assistance will be required to certify that they are a United States citizen or national, or an alien lawfully present in the United States.

The relocation assistance to which you are entitled includes:

- ☐ **Payment for Moving Expenses.** You are entitled to be reimbursed for all reasonable out-of-pocket expenses incurred in connection with any temporary

move. *[PHA should list the form of payment for moving expenses selected in accordance with Appendix 1, Section 4 of this Notice.]*

- ☐ The location of your temporary replacement unit is *[address]*. This temporary housing has been determined to be decent, safe and sanitary.
- ☐ *[List appropriate relocation advisory services and any other services and assistance provided.]*

If you disagree with this determination, you may file a written appeal to the PHA in accordance with 49 CFR 24.10.

If you have any questions about this notice and your eligibility for relocation assistance and payments, please contact *[Name, Title, Address, Phone, Email Address]* before you make any moving plans. He/she will assist you with your move to a temporary unit and help ensure that you preserve your eligibility for any relocation payments to which you may be entitled.

Remember, do not move or commit to the purchase or lease of a replacement home before we have a chance to further discuss your eligibility for relocation assistance. This letter is important to you and should be retained.

Sincerely,

Print name:

Title:

NOTE: The case file must indicate the manner in which this notice was delivered (e.g., personally served or certified mail, return receipt requested) and the date of delivery. (See 49 CFR 24.5 and Paragraph 2-3(J) of Handbook 1378.)

Appendix 4: SAMPLE RAD NOTICE OF RELOCATION (For relocation anticipated for more than a year)

***THIS IS A GUIDE FORM.
REVISE TO REFLECT THE PROJECT-SPECIFIC CIRCUMSTANCES.***

PHA Letterhead

(date)

Dear [Resident Name],

The property you currently occupy is participating in the Department of Housing and Urban Development's (HUD) Rental Assistance Demonstration (RAD) program. On [date], the [Public Housing Authority] (PHA), notified you of proposed plans to [acquire/ rehabilitate/demolish] the property you currently occupy at [address]. On [date], HUD issued the RAD Conversion Commitment (RCC) and committed federal financial assistance to the project. *[In instances where a Notice of Intent to Acquire is applicable and this notice is being sent before the RCC is issued, in lieu of the previous sentence noting the RCC issuance date, insert: [Name of entity acquiring the property] (Displacing Agency) intends to acquire the property you currently occupy. This is a Notice of Intent to Acquire.]*

In order for PHA to complete the project, you will need to be relocated for [anticipated duration of relocation]. Upon completion of the project, you will be able to lease and occupy your present unit or another decent, safe and sanitary unit in the completed project under reasonable terms and conditions. You are eligible for relocation assistance and payments. Because we expect your relocation to exceed one year, you have the choice to either:

- Receive temporary relocation assistance and return to a unit in the RAD project once it is complete; or
- Receive permanent relocation assistance and payments consistent with the URA instead of returning to the completed RAD project.

You must inform us of your choice within 30 days.

However, **you do not need to move now.** If you choose temporary relocation assistance, you will not be required to move sooner than 30 days after you receive notice that a temporary unit is available for you. If you choose permanent relocation assistance, you will not be required to move sooner than 90 days after you receive written notice that at least one comparable replacement unit is available to you in accordance with 49 CFR 24.204(a). *[Note to PHA: These time periods may start running as of the date of this Notice if the notice of relocation includes such information on the temporary and/or comparable replacement dwelling options, as applicable. In such circumstance, add applicable sentences to adequately notify the resident. For example: This notice informs you that a temporary unit, listed below, has been made available to you and, if you choose this option, you will be required to move by [date no sooner than 30 days after notice]. This notice informs you*

that a comparable unit, listed below, has been made available to you and, if you choose this option, you will be required to move by *[date no sooner than 90 days after notice]*.

If you choose temporary relocation, your relocation exceeds one year and you qualify as a "displaced person" under the Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA), you may become eligible for further relocation assistance and payments under URA.

NOTE: Aliens not lawfully present in the United States are not eligible for URA relocation assistance, unless such ineligibility would result in exceptional and extremely unusual hardship to a qualifying spouse, parent, or child as defined at 49 CFR 24.208(h). All persons seeking relocation assistance will be required to certify that they are a United States citizen or national, or an alien lawfully present in the United States.

If you choose to receive temporary relocation assistance, this assistance will include:

- Payment for Moving Expenses. You are entitled to be reimbursed for all reasonable out-of-pocket expenses incurred in connection with any temporary move. *[PHA should list the form of payment for moving expenses selected in accordance with Appendix 1, Section 4 of this Notice.]*
- The location of your temporary replacement unit is *[address]*. This temporary housing has been determined to be decent, safe and sanitary.
- *[List appropriate relocation advisory services and any other services and assistance provided.]*

If you elect to receive permanent relocation assistance, this assistance will include:

- Relocation Advisory Services. You are entitled to receive current and continuing information on available comparable replacement units and other assistance to help you find another home and prepare to move.
- Payment for Moving Expenses. *[PHA should list the form of payment for moving expenses selected in accordance with Appendix 1, Section 5 of this Notice.]*
- Replacement Housing Payment. You may be eligible for a replacement housing payment to rent or buy a replacement home. The payment is based on several factors including: (1) the monthly rent and cost of utility services for a comparable replacement unit, (2) the monthly rent and cost of utility services for your present unit, and (3) 30% of your average monthly gross household income. This payment is calculated on the difference between the old and new housing costs for a one-month period and multiplied by 42.
- *[PHA: list here any permanent relocation assistance offered, such as a Housing Choice Voucher.]*

- ☐ Listed below are three comparable replacement units that you may wish to consider for your replacement home. If you would like, we can arrange transportation for you to inspect these and other replacement units.

	Address	Rent & Utility Costs	Contact Info
1.			
2.			
3.			

We believe that the unit located at [address] is most representative of your original unit in the converting RAD project. The monthly rent and the estimated average monthly cost of utilities for this unit is [\$ amount] and it will be used to calculate your maximum replacement housing payment. Please contact us immediately if you believe this unit is not comparable to your original unit. We can explain our basis for selecting this unit as most representative of your original unit and discuss your concerns.

Based on the information you have provided about your income and the rent and utilities you now pay, you may be eligible for a maximum replacement housing payment of approximately [\$ (42 x monthly amount)], if you rent the unit identified above as the most comparable to your current home or rent another unit of equal cost.

Replacement housing payments are not adjusted to reflect future rent increases or changes in income. This is the maximum amount that you would be eligible to receive. If you rent a decent, safe and sanitary home where the monthly rent and average estimated utility costs are less than the comparable unit, your replacement housing payment will be based on the actual cost of that unit. All replacement housing payments must be paid in installments. Your payment will be paid in [#] installments.

You may choose to purchase (rather than rent) a decent, safe and sanitary replacement home. If you do, you would be eligible for a down-payment assistance payment which is equal to your maximum replacement housing payment, [\$amount.] *[PHAs should note that, at the agency's discretion, a down-payment assistance payment that is less than \$5,250 may be increased to any amount not to exceed \$5,250. (See 49 CFR 24.402(c)(1)).]* Let us know if you are interested in purchasing a replacement home and we will help you locate such housing.

Please note that all replacement housing must be inspected in order to ensure it is decent, safe and sanitary before any replacement housing payments are made.

If you have any questions about this notice and your eligibility for relocation assistance and payments, please contact [Name, Title, Address, Phone, Email Address] before you make any moving plans. He/she will assist you with your move to a new home and help ensure that you preserve your eligibility for all relocation payments to which you may be entitled.

Remember, do not move or commit to the purchase or lease of a replacement home before we have a chance to further discuss your eligibility for relocation assistance. This letter is important to you and should be retained.

Sincerely,

Print name:

Title:

Enclosure/s

NOTE: The case file must indicate the manner in which this notice was delivered (e.g., personally served or certified mail, return receipt requested) and the date of delivery. (See 49 CFR 24.5 and Paragraph 2-3(J) of Handbook 1378.)

Appendix 5: SAMPLE NOTICE OF ELIGIBILITY FOR URA RELOCATION ASSISTANCE (For residents who have been temporarily relocated for more than a year)

***THIS IS A GUIDE FORM.
IT SHOULD BE REVISED TO REFLECT THE CIRCUMSTANCES.***

PHA Letterhead

(date)

Dear [Resident]:

The property you formerly occupied at [address] is participating in the Department of Housing and Urban Development's (HUD) Rental Assistance Demonstration (RAD) program. You have been temporarily relocated from that property since [date.] Your temporary relocation has exceeded one year.

It has been determined that you qualify as a "displaced person" according to the Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA). You are eligible for relocation assistance and payments under the URA.

You may choose to remain temporarily relocated and return to a unit in the RAD project once it is completed. It is currently estimated that you may return to the RAD project by [date]. If you choose to remain temporarily relocated, you will stay at your current location until the RAD project is completed.

Alternatively, you may choose permanent relocation assistance and payments for which you are eligible, as listed below. If you choose permanent relocation assistance, you give up your right to return to the completed RAD project. However, **you do not need to move now.** If you choose permanent relocation assistance instead of exercising your right to return to the completed RAD project, you will not be required to move sooner than 90 days from the date that at least one comparable replacement unit has been made available to you. [Alternatively: You will not be required to move sooner than 90 days from the date of this notice, which informs you of a comparable replacement unit that has been made available for you].

This is your Notice of Eligibility for relocation assistance.

The effective date of your eligibility is [insert date that relocation exceeds one year.]

NOTE: Aliens not lawfully present in the United States are not eligible for URA relocation assistance, unless such ineligibility would result in exceptional and extremely unusual hardship to a qualifying spouse, parent, or child as defined at 49 CFR 24.208(h). All persons seeking relocation assistance will be required to certify that they are a United States citizen or national, or an alien lawfully present in the United States.

Enclosed is a brochure entitled, "Relocation Assistance to Tenants Displaced From Their Homes." Please read the brochure carefully. It explains your rights and provides additional information on eligibility for relocation payments and what you must do in order to receive these payments.

The relocation assistance to which you are entitled includes:

- Relocation Advisory Services. You are entitled to receive current and continuing information on available comparable replacement units and other assistance to help you find another home and prepare to move.
- Payment for Moving Expenses. *[PHA should list the form of payment for moving expenses selected in accordance with Appendix 1, Section 5 of this Notice.]* This is in addition to any amounts received to reimburse for any reasonable out-of-pocket expenses incurred in connection with the temporary move.
- Replacement Housing Payment. You may be eligible for a replacement housing payment to rent or buy a replacement home. The payment is based on several factors including: (1) the monthly rent and cost of utility services for a comparable replacement unit, (2) the monthly rent and cost of utility services for your present home, and (3) for low-income persons, 30 percent of your average monthly gross household income. This payment is calculated on the difference between the old and new housing costs for a one-month period and multiplied by 42.
- *[PHA list here any other relocation assistance offered the resident, such as Housing Choice Voucher.]*

Listed below are three comparable replacement units that you may wish to consider for your replacement home. If you would like, we can arrange transportation for you to inspect these and other replacement units.

	Address	Rent & Utility Costs	Contact Info
1.			
2.			
3.			

We believe that the unit located at *[address]* is most representative of the original unit you occupied in the converting RAD project. The monthly rent and the estimated average monthly cost of utilities for this unit is \$*[amount]* and it will be used to calculate your maximum replacement housing payment. Please contact us immediately if you believe this unit is not comparable to your original unit. We can explain our basis for selecting this unit as most representative of your original unit and discuss your concerns.

Based on the information you have provided about your income and the rent and utilities you now pay, you may be eligible for a maximum replacement housing payment of approximately \$ [42 x \$Amount], if you rent the unit identified above as the most comparable to your current home or rent another unit of equal cost.

Replacement housing payments are not adjusted to reflect future rent increases or changes in income. This is the maximum amount that you would be eligible to receive. If you rent a decent, safe and sanitary home where the monthly rent and average estimated utility costs are less than the comparable unit, your replacement housing payment will be based on the actual cost of that unit. All replacement housing payments must be paid in installments. Your payment will be paid in [#] installments.

Should you choose to purchase (rather than rent) a decent, safe and sanitary replacement home, you would be eligible for a downpayment assistance payment which is equal to your maximum replacement housing payment, [\$ amount] *[PHAs should note that, at the agency's discretion, a downpayment assistance payment that is less than \$5,250 may be increased to any amount not to exceed \$5,250. (See 49 CFR 24.402(c)(1)).]* Let us know if you are interested in purchasing a replacement home and we will help you locate such housing.

Please note that all replacement housing must be inspected in order to ensure it is decent, safe, and sanitary before any replacement housing payments are made.

If you have any questions about this notice and your eligibility for relocation assistance and payments, please contact [Name, Title, Address, Phone, Email Address] before you make any moving plans. He/she will assist you with your move to a new home and help ensure that you preserve your eligibility for any applicable relocation payments.

Remember, do not move or commit to the purchase or lease of a replacement home before we have a chance to further discuss your eligibility for relocation assistance. This letter is important to you and should be retained.

Sincerely,

Print Name:

Title:

Enclosure/s

NOTE: The case file must indicate the manner in which this notice was delivered (e.g., personally served or certified mail, return receipt requested) and the date of delivery. (See 49 CFR 24.5 and Paragraph 2-3(J) of Handbook 1378.)



Report to the
**Housing Authority
of the City of Green Bay**

MEETING DATE

May 18, 2023

PREPARED BY

Stephanie Schmutzer, Staff

AGENDA ITEM # F.I

Consideration with possible action on approval of the Annual Civil Rights Certification, Resolution 2023-02.

BACKGROUND

The Green Bay Housing Authority (GBHA) is considered a qualified Public Housing Authority. Outside of the 5-year PHA Plan, that was approved April 11, 2019. The only form that is required to be submitted to the Department of Housing and Urban Development yearly is the attached 50077-CR, which is the Civil Rights Certification.

This certifies that the GBHA will carry out its programs in conformity with title VI of the Civil Rights Act of 1964, the Fair Housing Act, Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990.

RECOMMENDATION

To approve Resolution 2023-02, Annual Civil Rights Certification.

FISCAL IMPACT

ATTACHMENTS

- I. NO 2023-02 Civil Rights

Civil Rights Certification (Qualified PHAs)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 2577-0226
Expires 3/31/2024

Civil Rights Certification

Annual Certification and Board Resolution #2023-02

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairperson or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the 5-Year PHA Plan, hereinafter referred to as "the Plan", of which this document is a part, and make the following certification and agreements with the Department of Housing and Urban Development (HUD) for the fiscal year beginning July 1st, 2023 in which the PHA receives assistance under 42 U.S.C. 1437f and/or 1437g in connection with the mission, goals, and objectives of the public housing agency and implementation thereof:

The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d-2000d—4), the Fair Housing Act (42 U.S.C. 3601-19), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), title II of the Americans with Disabilities Act (42 U.S.C. 12101 *et seq.*), and other applicable civil rights requirements and that it will affirmatively further fair housing in the administration of the program. In addition, if it administers a Housing Choice Voucher Program, the PHA certifies that it will administer the program in conformity with the Fair Housing Act, title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, title II of the Americans with Disabilities Act, and other applicable civil rights requirements, and that it will affirmatively further fair housing in the administration of the program. The PHA will affirmatively further fair housing, which means that it will take meaningful actions to further the goals identified in the Assessment of Fair Housing (AFH) conducted in accordance with the requirements of 24 CFR § 5.150 through 5.180, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR § 903.7(o)(3). The PHA will fulfill the requirements at 24 CFR § 903.7(o) and 24 CFR § 903.15(d). Until such time as the PHA is required to submit an AFH, the PHA will fulfill the requirements at 24 CFR § 903.7(o) promulgated prior to August 17, 2015, which means that it examines its programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintains records reflecting these analyses and actions.

Green Bay Housing Authority
PHA Name

WI074
PHA Number/HA Code

I hereby certify that all the statement above, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Executive Director: Cheryl Renier-Wigg

Name of Board Chairperson: Willian VandeCastle

Signature

Date

Signature

Date

The United States Department of Housing and Urban Development is authorized to collect the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 *et seq.*, and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality. The information is collected to ensure that PHAs carry out applicable civil rights requirements.

Public reporting burden for this information collection is estimated to average 0.16 hours per response, including the time for reviewing instructions, searching existing data sources, gathering, and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.



Report to the
**Housing Authority
of the City of Green Bay**

MEETING DATE

May 18, 2023

PREPARED BY

Stephanie Schmutzer, Staff

AGENDA ITEM # F.2

Consideration with possible action on approval of GBHA operating budget and Budget Resolution 2023-03, for Fiscal Year Beginning July 1, 2023.

BACKGROUND

The GBHA annual operating budget runs from July 1, 2023, through June 30, 2024. Much of the budget is consistent with prior years. Interest income was increased to reflect the market change to high interest rates overall. Overall, the budget is similar to last year's budget, any major changes are listed below:

Central Office Coast Center (COCC): - Revenues were decreased by \$6,500 due to keeping units open for the RAD conversion. There was a total expense increase of \$2,800 from the prior budget. This was to account for increases in insurance premiums and wage increases. In addition, the \$3,000 that was not spent last year on Marketing was increased to \$5,000 to create a logo and new branding for the GBHA.

Mason Manor: - There was an overall increase in revenues of \$4,700; HUD contributions are expected to increase by \$42,900. Rent income is expected to decrease by \$13,300 along with cell tower rent by \$27,500 due to a lease being terminated. Expenses decreased in total by \$14,900; maintenance contracts & maintenance supplies decreased by \$23,000 in anticipation of the complete renovation planned along with a decrease of \$8,900 in Management fees. Expenses increased for gas by \$17,500 and tenant service contracts by \$20,600; this covers cable services, computer access & RN community outreach.

Revenue Bonds: - Revenues were increased by \$51,000 to account for the new bond fees and loan payments. There were no significant changes to expenses.

HUD requires a board resolution showing approval of the budget, resolution #2023-03

RECOMMENDATION

Approval of the GBHA operating budget and Budget Resolution No. 2023-03, for Fiscal Year Beginning July 1, 2023.

FISCAL IMPACT

ATTACHMENTS

1. 23-24 Budget
2. No 2023-03 Budget Resolution
3. Training Needs - 23-24

COCC						
	PY	YTD 7/1-3/31	22-23 Budget	23-24 Budget	\$ Budget changed	% of Budget changed
Income						
2802.00 · Hud Contributions	0.00	0.00	0.00	0.00	0.00	0.0%
3110.00 · Dwelling Rental	0.00	0.00	0.00	0.00	0.00	0.0%
3120.00 · Excess Utilities	0.00	0.00	0.00	0.00	0.00	0.0%
3510.00 · Management Fee Revenue	136,487.98	106,469.95	138,580.80	131,781.60	-6,799.20	-4.91%
3520.00 · Asset Management Rev	24,120.00	18,090.00	24,000.00	24,000.00	0.00	0.0%
3530.00 · BookKeeping Fee Rev	17,535.00	13,402.50	18,000.00	18,000.00	0.00	0.0%
3610.00 · Int Income	355.59	0.00	30.00	250.00	220.00	733.33%
3690.00 · Other Income - Tenants	0.00	0.00	0.00	0.00	0.00	0.0%
3690.01 · Other Income - Ins Dividends	202.85	159.52	100.00	100.00	0.00	0.0%
3690.02 · Other Income	0.00	1,045.09	0.00	0.00	0.00	0.0%
3690.03 · Cell Tower Rent	0.00	0.00	0.00	0.00	0.00	0.0%
9110.00 · Transfers In	30,789.02	0.00	0.00	0.00	0.00	0.0%
Total Income	209,490.44	139,167.06	180,710.80	174,131.60	-6,579.20	-3.64%
Expense						
4110.00 · Admin Salaries	56,128.99	56,558.49	70,000.00	71,500.00	1,500.00	2.14%
4120.00 · Compensated Absences	1,923.71	0.00	0.00	0.00	0.00	0.0%
4130.00 · Legal Expense	10.00	0.00	6,000.00	6,000.00	0.00	0.0%
4130.01 · Investigations Expense	0.00	0.00	0.00	0.00	0.00	0.0%
4140.00 · Staff Training	89.91	1,589.97	9,000.00	9,000.00	0.00	0.0%
4150.00 · Travel	198.61	113.71	200.00	200.00	0.00	0.0%
4160.00 · Management Fee	0.00	0.00	0.00	0.00	0.00	0.0%
4163.00 · BookKeeping Fee	0.00	0.00	0.00	0.00	0.00	0.0%
4165.00 · Asset Management Fee	0.00	0.00	0.00	0.00	0.00	0.0%
4171.00 · Auditing Fees	1,900.00	2,166.00	1,950.00	2,500.00	550.00	28.21%
4182.00 · Employee Benefits - Admin	24,071.71	22,027.53	30,500.00	29,000.00	-1,500.00	-4.92%
4190.01 · Printing	324.44	39.60	300.00	300.00	0.00	0.0%
4190.02 · Postage	171.08	180.02	300.00	200.00	-100.00	-33.33%
4190.03 · Paper & Office Supplies	554.90	150.17	900.00	900.00	0.00	0.0%
4190.04 · Publications	189.95	0.00	300.00	300.00	0.00	0.0%
4190.05 · Membership Dues & Fees	70.00	70.00	400.00	400.00	0.00	0.0%
4190.06 · Computer Support	2,489.35	2,066.59	7,000.00	7,000.00	0.00	0.0%
4190.07 · Tele Fax & Comm	0.00	0.00	0.00	0.00	0.00	0.0%
4190.08 · Marketing	0.00	0.00	3,000.00	5,000.00	2,000.00	66.67% ^^^
4190.10 · Miscellaneous	18,196.52	12,381.02	15,000.00	15,000.00	0.00	0.0% ^
4220.00 · Ten Ser-Recr Etc	0.00	0.00	0.00	0.00	0.00	0.0%
4220.01 · Ten Ser - Resident Part	0.00	0.00	0.00	0.00	0.00	0.0%
4230.00 · Ten Ser-Contrs	0.00	0.00	0.00	0.00	0.00	0.0%
4310.00 · Water	0.00	0.00	0.00	0.00	0.00	0.0%
4320.00 · Electricity	0.00	0.00	0.00	0.00	0.00	0.0%
4320.01 · Utility Reimbursements	0.00	0.00	0.00	0.00	0.00	0.0%
4330.00 · Gas	0.00	0.00	0.00	0.00	0.00	0.0%
4390.00 · Other Utilities	0.00	0.00	0.00	0.00	0.00	0.0%
4410.00 · Maint - Labor	0.00	0.00	0.00	0.00	0.00	0.0%
4420.00 · Maint - Supplies	0.00	0.00	100.00	100.00	0.00	0.0%
4430.00 · Maint - Contracts	0.00	0.00	0.00	0.00	0.00	0.0%
4430.01 · Maint - Non-Contract	0.00	0.00	0.00	0.00	0.00	0.0%
4430.03 · Maint - Truck Maint	0.00	2.58	100.00	100.00	0.00	0.0%
4430.09 · Fire Protection - Maint	0.00	0.00	0.00	0.00	0.00	0.0%
4430.10 · Heating and Cooling	0.00	0.00	0.00	0.00	0.00	0.0%
4430.11 · Snow Removal	0.00	0.00	0.00	0.00	0.00	0.0%
4430.12 · Elevator Maintenance	0.00	0.00	0.00	0.00	0.00	0.0%
4430.13 · Landscape and Grounds	0.00	0.00	0.00	0.00	0.00	0.0%
4430.14 · Unit Turnaround	0.00	0.00	0.00	0.00	0.00	0.0%
4430.15 · Electrical	0.00	0.00	0.00	0.00	0.00	0.0%
4430.16 · Plumbing	0.00	0.00	0.00	0.00	0.00	0.0%
4430.17 · Extermination	0.00	0.00	0.00	0.00	0.00	0.0%
4430.18 · Appliances	0.00	0.00	0.00	0.00	0.00	0.0%
4430.19 · Garbage & Trash Removal	0.00	0.00	0.00	0.00	0.00	0.0%
4432.00 · Extraordinary Maintenance	0.00	0.00	0.00	0.00	0.00	0.0%
4433.00 · Emp Ben Contr-ord maint	0.00	0.00	0.00	0.00	0.00	0.0%
4480.00 · Protect Service	0.00	0.00	0.00	0.00	0.00	0.0%
4510.00 · Insurance Expense - Property	0.00	0.00	0.00	0.00	0.00	0.0%
4510.01 · Insurance Expenses - Liability	300.00	600.00	400.00	750.00	350.00	87.5%
4520.00 · PILOT	0.00	0.00	0.00	0.00	0.00	0.0%
4530.00 · Bank Fees	1,047.31	715.26	1,100.00	1,100.00	0.00	0.0%
4572.00 · Bad Debt - Tenant Rents	0.00	0.00	0.00	0.00	0.00	0.0%
4590.00 · Other General	19,475.00	0.00	12,000.00	12,000.00	0.00	0.0% ^^
4600.00 · Leases	0.00	0.00	0.00	0.00	0.00	0.0%
4800.00 · Depreciation Expense	500.78	0.00	650.00	650.00	0.00	0.0%
9120.00 · Transfers Out	0.00	0.00	0.00	0.00	0.00	0.0%
Total Expense	127,642.26	98,660.94	159,200.00	162,000.00	2,800.00	1.76%
Net Income/(loss)	81,848.18	40,506.12	21,510.80	12,131.60		

^City fees for services

^^ (PY title ins) Capital needs Assessment/ Consultant

^^^ creating logo/branding

Mason Manor						
	PY	YTD 7/1-3/31	22-23 Budget	23-24 Budget	\$ Budget changed	% of Budget changed
Income						
2802.00 · Hud Contributions	322,532.00	163,485.00	175,000.00	217,980.00	42,980.00	24.56%
3110.00 · Dwelling Rental	511,925.04	379,222.84	519,000.00	505,630.00	-13,370.00	-2.58%
3120.00 · Excess Utilities	5,392.00	3,524.00	5,000.00	5,000.00	0.00	0.0%
3510.00 · Management Fee Revenue	0.00	0.00	0.00	0.00	0.00	0.0%
3520.00 · Asset Management Rev	0.00	0.00	0.00	0.00	0.00	0.0%
3530.00 · BookKeeping Fee Rev	0.00	0.00	0.00	0.00	0.00	0.0%
3610.00 · Int Income	865.46	46,497.88	75.00	2,000.00	1,925.00	2,566.67%
3690.00 · Other Income - Tenants	6,395.00	3,305.00	5,000.00	4,000.00	-1,000.00	-20.0%
3690.01 · Other Income - Ins Dividends	12,982.52	4,306.65	7,500.00	5,750.00	-1,750.00	-23.33%
3690.02 · Other Income	20,446.89	17,283.35	11,500.00	15,000.00	3,500.00	30.44%
3690.03 · Cell Tower Rent	127,361.92	77,327.24	140,400.00	112,875.02	-27,524.98	-19.61%
9110.00 · Transfers In	0.00	0.00	0.00	0.00	0.00	0.0%
Total Income	1,007,900.83	694,951.96	863,475.00	868,235.02	4,760.02	0.55%
Expense						
4110.00 · Admin Salaries	85,647.81	86,154.58	110,500.00	117,500.00	7,000.00	6.34%
4120.00 · Compensated Absences	-248.05	0.00	500.00	500.00	0.00	0.0%
4130.00 · Legal Expense	413.45	400.44	1,500.00	750.00	-750.00	-50.0%
4130.01 · Investigations Expense	1,296.41	56.16	2,600.00	1,300.00	-1,300.00	-50.0%
4140.00 · Staff Training	726.52	79.00	5,000.00	5,000.00	0.00	0.0%
4150.00 · Travel	228.43	145.22	250.00	250.00	0.00	0.0%
4160.00 · Management Fee	104,736.04	81,500.88	105,627.84	96,639.84	-8,988.00	-8.51%
4163.00 · BookKeeping Fee	13,455.00	10,260.00	13,680.00	13,680.00	0.00	0.0%
4165.00 · Asset Management Fee	18,360.00	13,770.00	18,240.00	18,240.00	0.00	0.0%
4171.00 · Auditing Fees	3,800.00	4,332.00	3,850.00	4,500.00	650.00	16.88%
4182.00 · Employee Benefits - Admin	33,929.29	31,379.06	44,500.00	38,000.00	-6,500.00	-14.61%
4190.01 · Printing	1,006.01	723.62	1,000.00	1,000.00	0.00	0.0%
4190.02 · Postage	949.50	426.00	1,100.00	1,100.00	0.00	0.0%
4190.03 · Paper & Office Supplies	901.84	1,217.85	1,000.00	1,500.00	500.00	50.0%
4190.04 · Publications	0.00	0.00	0.00	0.00	0.00	0.0%
4190.05 · Membership Dues & Fees	239.00	0.00	0.00	0.00	0.00	0.0%
4190.06 · Computer Support	12,910.54	7,233.09	15,000.00	7,500.00	-7,500.00	-50.0%
4190.07 · Tele Fax & Comm	1,760.39	1,661.94	2,250.00	2,250.00	0.00	0.0%
4190.08 · Marketing	1,375.07	180.00	2,300.00	2,300.00	0.00	0.0%
4190.10 · Miscellaneous	975.00	1,358.46	1,500.00	1,500.00	0.00	0.0%
4220.00 · Ten Ser-Recr Etc	76.98	28.45	200.00	200.00	0.00	0.0%
4220.01 · Ten Ser - Resident Part	3,224.54	2,892.82	2,900.00	2,900.00	0.00	0.0%
4230.00 · Ten Ser-Contrs	40,874.67	40,000.08	26,800.00	47,433.92	20,633.92	76.99%
4310.00 · Water	42,505.99	25,628.36	42,000.00	37,500.00	-4,500.00	-10.71%
4320.00 · Electricity	58,974.47	58,477.05	66,000.00	66,000.00	0.00	0.0%
4320.01 · Utility Reimbursements	0.00	0.00	0.00	0.00	0.00	0.0%
4330.00 · Gas	32,773.44	34,682.39	28,500.00	46,000.00	17,500.00	61.4%
4390.00 · Other Utilities	5,009.02	3,353.78	6,000.00	5,000.00	-1,000.00	-16.67%
4410.00 · Maint - Labor	104,576.16	106,302.05	133,000.00	134,000.00	1,000.00	0.75%
4420.00 · Maint - Supplies	16,134.26	9,965.16	18,000.00	10,000.00	-8,000.00	-44.44%
4430.00 · Maint - Contracts	19,902.40	12,182.71	20,000.00	10,000.00	-10,000.00	-50.0%
4430.01 · Maint - Non-Contract	10,589.97	3,528.18	10,000.00	5,000.00	-5,000.00	-50.0%
4430.03 · Maint - Truck Maint	1,825.14	4,311.68	3,000.00	3,000.00	0.00	0.0%
4430.09 · Fire Protection - Maint	7,015.26	4,865.38	4,200.00	5,000.00	800.00	19.05%
4430.10 · Heating and Cooling	1,687.34	3,705.78	6,500.00	5,000.00	-1,500.00	-23.08%
4430.11 · Snow Removal	1,808.21	1,111.77	6,500.00	3,000.00	-3,500.00	-53.85%
4430.12 · Elevator Maintenance	11,830.00	10,202.44	14,500.00	14,500.00	0.00	0.0%
4430.13 · Landscape and Grounds	3,230.74	1,853.59	1,500.00	1,500.00	0.00	0.0%
4430.14 · Unit Turnaround	0.00	0.00	0.00	0.00	0.00	0.0%
4430.15 · Electrical	0.00	0.00	0.00	0.00	0.00	0.0%
4430.16 · Plumbing	1,848.00	1,542.65	1,500.00	1,500.00	0.00	0.0%
4430.17 · Extermination	18,854.96	12,432.14	22,000.00	17,500.00	-4,500.00	-20.46%
4430.18 · Appliances	0.00	0.00	0.00	0.00	0.00	0.0% #
4430.19 · Garbage & Trash Removal	6,583.40	3,871.72	6,000.00	7,000.00	1,000.00	16.67%
4432.00 · Extraordinary Maintenance	0.00	0.00	0.00	0.00	0.00	0.0%
4433.00 · Emp Ben Contr-ord maint	38,642.67	36,389.50	42,500.00	37,000.00	-5,500.00	-12.94%
4480.00 · Protect Service	0.00	0.00	0.00	0.00	0.00	0.0%
4510.00 · Insurance Expense - Property	35,598.20	38,799.00	36,000.00	40,000.00	4,000.00	11.11%
4510.01 · Insurance Expenses - Liability	7,702.00	8,126.00	8,000.00	8,500.00	500.00	6.25%
4520.00 · PILOT	37,906.41	0.00	38,000.00	38,000.00	0.00	0.0%
4530.00 · Bank Fees	0.00	0.00	0.00	0.00	0.00	0.0%
4572.00 · Bad Debt - Tenant Rents	5,218.72	0.00	5,000.00	5,000.00	0.00	0.0%
4590.00 · Other General	0.00	0.00	0.00	0.00	0.00	0.0%
4600.00 · Leases	0.00	0.00	0.00	0.00	0.00	0.0%
4800.00 · Depreciation Expense	110,263.33	0.00	150,000.00	150,000.00	0.00	0.0%
9120.00 · Transfers Out	0.00	0.00	0.00	0.00	0.00	0.0%
Total Expense	907,118.53	665,130.98	1,028,997.84	1,014,043.76	-14,954.08	-1.45%
Net Income/(loss)	100,782.30	29,820.98	(165,522.84)	(145,808.74)		

Appliances purchased w/ CFP

4,191.26 P/(I) without Depreciation

RevBonds					
PY	YTD 7/1-3/31	22-23 Budget	23-24 Budget	\$ Budget changed	% of Budget changed
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
917.98	0.00	75.00	250.00	175.00	233.33%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
254,862.00	63,345.92	11,715.00	63,091.84	51,376.84	438.56%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
255,779.98	63,345.92	11,790.00	63,341.84	51,551.84	437.25%
144.49	81.69	550.00	550.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%
0.00	0.00	0.00	0.00	0.00	0.0%

PHA Board Resolution

Approving Operating Budget

**U.S. Department of Housing
and Urban Development**
Office of Public and Indian Housing -
Real Estate Assessment Center (PIH-REAC)OMB No. 2577-0026
(exp. 06/30/2022)

Public reporting burden for this collection of information is estimated to average **10 minutes per response**, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number.

This information is required by Section 6(c)(4) of the U.S. Housing Act of 1937. The information is the operating budget for the low-income public housing program and provides a summary of the proposed/budgeted receipts and expenditures, approval of budgeted receipts and expenditures, and justification of certain specified amounts. HUD reviews the information to determine if the operating plan adopted by the public housing agency (PHA) and the amounts are reasonable, and that the PHA is in compliance with procedures prescribed by HUD. Responses are required to obtain benefits. This information does not lend itself to confidentiality.

PHA Name:

PHA Code:

PHA Fiscal Year Beginning:

Board Resolution Number:

Acting on behalf of the Board of Commissioners of the above-named PHA as its Chairperson, I make the following certifications and agreement to the Department of Housing and Urban Development (HUD) regarding the Board's approval of (check one or more as applicable):

DATE

- ☐ Operating Budget approved by Board resolution on:
- ☐ Operating Budget submitted to HUD, if applicable, on:
- ☐ Operating Budget revision approved by Board resolution on:
- ☐ Operating Budget revision submitted to HUD, if applicable, on:

I certify on behalf of the above-named PHA that:

1. All statutory and regulatory requirements have been met;
2. The PHA has sufficient operating reserves to meet the working capital needs of its developments;
3. Proposed budget expenditure are necessary in the efficient and economical operation of the housing for the purpose of serving low-income residents;
4. The budget indicates a source of funds adequate to cover all proposed expenditures;
5. The PHA will comply with the wage rate requirement under 24 CFR 968.110(c) and (f); and
6. The PHA will comply with the requirements for access to records and audits under 24 CFR 968.110(i).

I hereby certify that all the information stated within, as well as any information provided in the accompaniment herewith, if applicable, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012.31, U.S.C. 3729 and 3802)

Print Board Chairperson's Name:	Signature:	Date:
---------------------------------	------------	-------

TRAINING NEEDS -FYE 2023-2024
GBHA & GBHA Properties 1, Inc

<u>Training</u>	<u>Staff</u>	<u>Hotel</u>	<u>Meals</u>	<u>Rooms</u>	<u>Nights</u>	<u>Hotel Sub</u>	<u>Meals Subtotal</u>	<u>Registration</u>	<u>Travel</u>	<u># Vehicles</u>	<u>Miles</u>	<u>Subtotal</u>
Casterline Location: TBD - Out of State, Dates: TBD												
	Stephanie	\$200	\$75	1	2	\$400	\$150	\$800	\$700			\$2,050
Happy Training - Location: TBD - out of state, Dates: TBD												
	Sr Staff	\$200	\$75	1	3	\$600	\$225	\$750	\$700			\$2,275
Nan Mckay - HQS training - Location: TBD - out of state, Dates: TBD												
	Staff	\$200	\$75	1	3	\$600	\$225	\$750	\$400			\$1,975
	Staff	\$200	\$75	1	3	\$600	\$225	\$750	\$400			\$1,975
TDB - training new entity - Location: TBD - out of state, Dates: TBD												
	Stephanie	\$200	\$75	1	3	\$600	\$225	\$750	\$400			\$1,975
	Jayme	\$200	\$75	1	3	\$600	\$225	\$750	\$400			\$1,975

<u>Training</u>	<u>Staff</u>	<u>Hotel</u>	<u>Meals</u>	<u>Rooms</u>	<u>Nights</u>	<u>Hotel Sub</u>	<u>Meals</u>	<u>Registration</u>	<u>Travel Sub</u>	<u># Vehicles</u>	<u>Miles</u>	<u>Subtotal</u>
WAHA "Fall" Conference - Location: TBD, Dates: Sept 2023												
	Cheryl	\$115	\$55	1	3	\$345	\$165	\$325	\$152	1	260	\$987
	Jayme/Ka/Kaycee	\$115	\$55	1	3	\$345	\$165	\$325	\$0	0	260	\$835
	Stephanie	\$115	\$55	1	3	\$345	\$165	\$325	\$152	1	260	\$987
	Maintenance	\$115	\$55	1	3	\$345	\$165	\$325	\$0	0	260	\$835
GBHA	Commissioner	\$115	\$55	1	3	\$345	\$165	\$325	\$152	1	260	\$987
GBHA	Commissioner	\$115	\$55	1	3	\$345	\$165	\$325	\$0	0	260	\$835

WAHA "Spring" Conferences - Location: Wausau Date: April 2024												
	Cheryl	\$115	\$50	1	1	\$115	\$50	\$100	\$117	1	200	\$382
	Stephanie	\$115	\$50	1	1	\$115	\$50	\$100	\$117	1	200	\$382
	Jayme- cocc	\$115	\$50	1	1	\$115	\$50	\$100	\$0	0	200	\$265

\$18,720.30

MM 4,935.00
SS - Prop. 1 4,935.00
COCC 8,850.30
\$ 18,720.30



Report to the
**Housing Authority
of the City of Green Bay**

MEETING DATE

May 18, 2023

PREPARED BY

Stephanie Schmutzer, Staff

AGENDA ITEM # F.3

Consideration with possible action on Passbook Savings Rate.

BACKGROUND

Federal regulations require that when determining annual income for families in public housing, the PHA includes annual income greater than either 1) actual income resulting from all family assets; or 2) a percentage of the value of such assets based upon the current passbook savings rate when the family has assets in excess of \$5,000.

HUD requires PHAs to review the passbook savings rate annually and adjust as necessary. PHAs may establish a passbook savings rate within 75 basis points of the Savings National Rate in effect at the time the PHA establishes the passbook rate. The passbook savings rate may not be less than zero percent. As of April 17, 2023, the Savings National Rate is 0.39 percent; therefore, the GBHA may set its passbook savings rate between zero and 1.14 percent. The GBHA has set its passbook savings rate at zero percent for the past several years. Keeping the rate at 0% benefits our tenants.

RECOMMENDATION

To approve the passbook savings rate and remain at zero percent.

FISCAL IMPACT

ATTACHMENTS

- I. FDIC_ National Rates and Rate Caps



[Home](#) // [Resources](#) // [Bankers](#)

Bankers Resource Center

National Rates and Rate Caps

Revised Rule April 17, 2023

Last Updated: April 18, 2023

[National Rates and Rate Caps Home](#)

[Previous Rates](#)

Monthly Update

On December 15, 2020, the FDIC Board of Directors approved a [Final Rule - PDF](#) making certain revisions to the interest rate restrictions applicable to less than well capitalized institutions (as defined in Section 38 of the Federal Deposit Insurance Act), which are effective on April 1, 2021. The interest rate restrictions generally limit a less than well capitalized institution from soliciting deposits by offering rates that significantly exceed rates in its prevailing market.

The Final Rule redefined the “national rate” as the average of rates paid by all insured depository institutions and credit unions for which data is available, with rates weighted by each institution’s share of domestic deposits. The “national rate cap” is calculated as the higher of: (1) the national rate plus 75 basis points; or (2) 120 percent of the current yield on similar maturity U.S. Department of the Treasury (U.S. Treasury) obligations plus 75 basis points. The national rate cap for non-maturity deposits is the higher of the national rate plus 75 basis points or the federal funds rate plus 75 basis points.

A less than well capitalized institution may use the “local rate cap” in place of the national rate cap for deposits gathered from within the institution’s local market area. The Final Rule redefined the “local rate cap” for a particular deposit product as 90 percent of the highest rate offered on the deposit product by an institution or credit union accepting deposits at a physical location within the institution’s local market area.

In accordance with Section 337.7(d), an insured depository institution that seeks to pay a rate of interest up to its local market rate cap shall provide notice and evidence of the highest rate paid on a particular deposit product in the institution’s local market areas to the appropriate FDIC regional director. The

institution shall update its evidence and calculations for existing and new accounts monthly unless otherwise instructed by the appropriate FDIC regional director, and retain such information available for at least the two most recent examination cycles and, upon the FDIC’s request, provide the documentation to the appropriate FDIC regional office and to examination staff during any subsequent examinations.

Monthly Rate Cap Information as of April 17, 2023

Deposit Products ¹	National Deposit Rates ²	National Deposit Rates Rate Cap Adjusted	Treasury Yield ³	Treasury Yield Rate Cap Adjusted	National Rate Cap
Savings	0.39	1.14	4.83	5.58	5.58
Interest Checking	0.06	0.81	4.83	5.58	5.58
Money Market	0.57	1.32	4.83	5.58	5.58
1 month CD	0.24	0.99	4.74	6.44	6.44
3 month CD	0.78	1.53	4.85	6.57	6.57
6 month CD	1.03	1.78	4.94	6.68	6.68
12 month CD	1.54	2.29	4.64	6.32	6.32
24 month CD	1.43	2.18	4.06	5.62	5.62
36 month CD	1.34	2.09	3.81	5.32	5.32
48 month CD	1.29	2.04	3.81 ⁴	5.32	5.32
60 month CD	1.37	2.12	3.60	5.07	5.07

The FDIC began posting the National Rate and Rate Cap on May 18, 2009. Data is not available prior to May 18, 2009. Data from May 2009 through March 31, 2021, reflects the calculation in effect at that time (averages weighted by branch, and not including credit unions), while data posted after March 31, 2021, reflects the calculation described above.

This historical data can be accessed at [Previous Rates](#).

The monthly rate cap information will be published every 3rd Monday of each month. When the 3rd Monday falls on a Federal holiday, the rate cap information will be published on the next business day. All published rates and yields are based on information available on the last business day of the prior month end (note: rates and yields published on April 1, 2021, are based on information available as of February 26, 2021).

¹ If an institution seeks to offer a product with an off-tenor maturity that is not offered by another institution within its local market area, or for which the FDIC does not publish the national rate cap, the institution will be required to use the rate offered on the next lower on-tenor maturity for that deposit product when determining its applicable national or local rate cap, respectively. For example, an institution seeking to offer a 26-month certificate of deposit must use the rate offered for a 24-month CD to determine the applicable national or local rate cap.

² Source: S&P Capital IQ Pro; SNL Financial Data. Calculations: FDIC. Savings and interest checking account rates are based on the \$2,500 product tier, while money market and certificate of deposit rates represent an average of the \$10,000 and \$100,000 product tiers. Account types and maturities published in these tables are those most commonly offered by the banks and branches for which we have data (on-tenor maturities).

³ As noted above, in determining the National Rate Cap for a particular on-tenor maturity, the Final Rule requires the FDIC to calculate 120 percent of the current yield on similar maturity U.S. Treasury obligations plus 75 basis points. For on-tenor maturities for which the U.S. Treasury publishes a yield, the [treasury yields](#) (treasury.gov) in this column are those that are published by the U.S. Treasury for the corresponding obligation with the same maturity. For on-tenor maturities for which the U.S. Treasury does not publish a yield, the treasury yields in this column are the published Treasury yields for the obligation with next lowest maturity, which is viewed as a similar rate, as provided for in the Final Rule. For non-maturity deposits, where there is no comparable treasury yield, the yield used is the [effective federal funds](#) (newyorkfed.org) rate published by the Federal Reserve Bank of New York.

⁴ The Final Rule defines a maturity of 48 months as an on-tenor maturity. Since the U.S. Treasury does not publish a rate for a 48-month Treasury obligation the applicable Treasury Yield is the 36-month Treasury; see footnote 3.

[Get email alerts](#) when the national rates are updated.



Report to the
Housing Authority
of the City of Green Bay

MEETING DATE

May 18, 2023

PREPARED BY

Jayne Valentine, Staff

AGENDA ITEM # F.4

Consideration with possible action to approve Resolution 2023-04 authorizing submission of HUD RAD / Section 18 blend program application.

BACKGROUND

During the March 2020 GBHA meeting, the Board voted in favor of proceeding with the application to the Department of Housing and Urban Development (HUD) for the Rental Assistance Demonstration (RAD) / Section 18 program. The Board subsequently approved Resolution 2021-03 authorizing the HUD RAD / Section 18 blend application to HUD. Due to processing and timing, the GBHA is presenting the exact resolution, authorizing submission of HUD RAD / Section 18 blend application with an updated date.

RECOMMENDATION

To approve Resolution 2023-04 authorizing submission of HUD RAD / Section 18 blend program application.

FISCAL IMPACT**ATTACHMENTS**

- I. 2023-04 RAD Section 18 application

RESOLUTION NO. 2023-04

RESOLUTION OF THE GREEN BAY HOUSING AUTHORITY (GBHA) AUTHORIZING SUBMISSION OF HUD
RENTAL ASSISTANCE DEMONSTRATION (RAD) SECTION 18 BLEND APPLICATION

BY THE GREEN BAY HOUSING AUTHORITY:

WHEREAS: Public housing funding continues to decline with insufficient capital funds to adequately meet the needs of Mason Manor, a 152 unit 8 story building in need of substantial capital improvements and;

WHEREAS: the Rental Assistance Demonstration (RAD) Program/Section 18 blend provisions allow Public Housing Authorities the ability to convert funding into a financial platform that will provide for redevelopment of the building and predictable annual subsidy's and;

WHEREAS: This process will also allow the GBHA to apply for Low Income Housing Tax Credits (LIHTC), public or private debt and grant funds for the rehabilitation of Mason Manor and;

WHEREAS: the GBHA Board of Commissioners find that it is in the best long term interest of the GBHA to make an application to HUD for a RAD/Section 18 blend to facilitate the rehabilitation of Mason Manor

THEREFOR BE IT RESOLVED: that the Green Bay Housing Authority authorizes submission of HUD Rental Assistance Demonstration (RAD) Section 18 blend application

By: _____

William Vande Castle
Chairman

APPROVED: May 18, 2023 _____

ATTEST: _____

Cheryl Renier-Wigg
Executive Director



Report to the
Housing Authority
of the City of Green Bay

MEETING DATE

May 18, 2023

PREPARED BY

Jayne Valentine, Staff

AGENDA ITEM # F.5

Consideration with possible action to award the Mason Manor quarterly bed bug inspection contract to Sandberg K9 Solutions.

BACKGROUND

The previous quarterly bed bug inspection contract has expired. The proposed contract would be a three (3) year contract with two (2) one (1) year renewal options upon mutual agreement by both parties.

RECOMMENDATION

To approve the Mason Manor quarterly bed bug inspection contract to Sandberg K9 Solutions. Though Sandberg K9 Solutions was not the lowest responsive, responsible vendor, the only other contractor that submitted a bid was disqualified because they could not provide the required NESDCA certification specified in the request for bids.

FISCAL IMPACT**ATTACHMENTS**

- I. 2023-15 Bid Summary v.01

CITY OF GREEN BAY BID SUMMARY RFB #2023-15
Bed Bug Detection Services, GBHA

Dept: GBHA CC: 91000, 48500, 98800		VENDOR #1	VENDOR #2
Planholders: (2) Vendors		Batzner Pest Control	Sandberg K9 Solutions
Issued: 04/06/2023 Due: 04/27/2023		New Berlin, WI	De Pere, WI
DESCRIPTION	COST PER QUARTER	COST PER QUARTER	
Quarterly Inspections For Bed Bugs: June, September, December & March			
1st Floor - Inspection Cost:	\$ 255.00	\$ 207.80	
2nd Floor - Inspection Cost:	\$ 180.00	\$ 374.04	
3rd Floor - Inspection Cost:	\$ 210.00	\$ 436.38	
4th Floor - Inspection Cost:	\$ 210.00	\$ 436.38	
5th Floor - Inspection Cost:	\$ 210.00	\$ 436.38	
6th Floor - Inspection Cost:	\$ 210.00	\$ 436.38	
7th Floor - Inspection Cost:	\$ 210.00	\$ 436.38	
8th Floor - Inspection Cost:	\$ 210.00	\$ 436.38	
TOTAL COST PER QUARTER:	\$ 1,695.00	\$ 3,200.12	
1ST YEAR TOTAL COST:	\$ 6,780.00	\$ 12,800.48	
PAYMENT TERMS (NET 30):	-	-	
EARLY PAYMENT DISCOUNT:	-	-	
COMPANY ACCEPTS P-CARD PAYMENTS:	-	-	
BID COMPLIANT:	No	Yes	

RECOMMENDATION:

Award to the lowest responsive, responsible vendor Sandberg K9 Solutions in the amount of \$12,800.48 annually for a three (3) year contract with two (2) one (1) year renewal options upon mutual agreement by both parties. Batzner Pest Control could not provide required NESDCA Certification specified in the RFB.

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

March 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
Check		03/31/2023		Service Cha...	1111.01 · General ...	
				Service Charge	4530.00 · Bank Fees	-84.94
TOTAL						-84.94
Bill Pmt -Check	7052	03/13/2023	CELLCOM	cell bill	1111.01 · General ...	
Bill	493747	02/15/2023		cell bill	4190.07 · Tele Fax...	-46.07
				cell bill	4190.07 · Tele Fax...	-88.53
TOTAL						-134.60
Bill Pmt -Check	7053	03/13/2023	CITY OF GREEN B...		1111.01 · General ...	
Bill	970-12422	01/31/2023		Wages	4110.00 · Admin Sa...	-7,755.65
				Benefits	4182.00 · Employe...	-3,082.63
				Wages	4410.00 · Maint - L...	-9,851.05
				Benefits	4433.00 · Emp Ben...	-3,676.32
				Wages	4110.00 · Admin Sa...	-6,419.32
				Benefits	4182.00 · Employe...	-2,591.51
				Wages	4410.00 · Maint - L...	-3,052.60
				Benefits	4433.00 · Emp Ben...	-939.30
				Wages	4110.00 · Admin Sa...	-5,021.78
Bill	970-12420	02/14/2023		Benefits	4182.00 · Employe...	-2,110.70
				keys/deadbolts	4420.00 · Maint - S...	-57.02
				drain replace...	4420.00 · Maint - S...	-13.54
Bill	970-12420	02/15/2023		wall plate/ clo...	4420.00 · Maint - S...	-218.91
Bill	970-12422	02/28/2023		Wages	4110.00 · Admin Sa...	-7,357.13
				Benefits	4182.00 · Employe...	-2,889.67
				Wages	4410.00 · Maint - L...	-9,237.38
				Benefits	4433.00 · Emp Ben...	-3,548.87
				Wages	4110.00 · Admin Sa...	-6,909.59
				Benefits	4182.00 · Employe...	-2,788.18
				Wages	4410.00 · Maint - L...	-3,492.84
				Benefits	4433.00 · Emp Ben...	-1,065.08
				Wages	4110.00 · Admin Sa...	-4,993.14
				Benefits	4182.00 · Employe...	-2,095.92
				Wages	4110.00 · Admin Sa...	-33.26
				Benefits	4182.00 · Employe...	-14.51
TOTAL						-89,215.90
Bill Pmt -Check	7054	03/13/2023	HAWKINS ASH BA...		1111.01 · General ...	
Bill		02/15/2023		2022 Audit	4171.00 · Auditing ...	-4,332.00
				2022 Audit	4171.00 · Auditing ...	-4,332.00
				2022 Audit	4171.00 · Auditing ...	-2,166.00
				2022 Audit	4171.00 · Auditing ...	-570.00
TOTAL						-11,400.00
Bill Pmt -Check	7055	03/13/2023	Jayme Valentine	district meet...	1111.01 · General ...	
Bill	2/16/23 meeting	02/16/2023		district meeting	4150.00 · Travel	-30.57
TOTAL						-30.57
Bill Pmt -Check	7056	03/13/2023	KONE INC	mm	1111.01 · General ...	
Bill	1158482298	02/14/2023		repair elevato...	4430.12 · Elevator ...	-296.48
TOTAL						-296.48

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

March 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
Bill Pmt -Check	7057	03/13/2023	One Service LLC	mm	1111.01 · General ...	
Bill	555	02/15/2023		bed bug treat...	4430.17 · Extermin...	-280.00
TOTAL						-280.00
Bill Pmt -Check	7058	03/13/2023	Sandberg K9 Solu...	mm	1111.01 · General ...	
Bill	2057	03/01/2023		Quarterly ins...	4430.17 · Extermin...	-2,999.98
TOTAL						-2,999.98
Bill Pmt -Check	7059	03/13/2023	TIME WARNER CA...	mm	1111.01 · General ...	
Bill	0437255021823	02/18/2023		wifi	4230.00 · Ten Ser-...	-89.99
TOTAL						-89.99
Bill Pmt -Check	7060	03/16/2023		SD refund	1111.01 · General ...	
Bill	SD refund	03/10/2023		SD refund - ... Credit on acc...	2114.00 · Tenant S... 3110.00 · Dwelling ...	-151.22 -69.56
TOTAL						-220.78
Bill Pmt -Check	7061	03/16/2023		sd refund	1111.01 · General ...	
Bill	SD refund	03/03/2023		SD refund - ...	2114.00 · Tenant S...	-174.00
TOTAL						-174.00
Bill Pmt -Check	7062	03/23/2023	AT&T	door system	1111.01 · General ...	
Bill	2/22/23	02/22/2023		door system door system	4190.07 · Tele Fax... 4190.07 · Tele Fax...	-82.30 -54.86
TOTAL						-137.16
Bill Pmt -Check	7063	03/23/2023	BELLIN HOME HE...	mm	1111.01 · General ...	
Bill	MB9541	03/11/2023		RN Communi...	4230.00 · Ten Ser-...	-250.00
TOTAL						-250.00
Bill Pmt -Check	7064	03/23/2023	CEC	1424 Admiral	1111.01 · General ...	
Bill	398550	03/06/2023		batteries	4430.09 · Fire Prote...	-225.90
TOTAL						-225.90

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

March 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
Bill Pmt -Check	7065	03/23/2023	CITY OF GREEN B...		1111.01 · General ...	
Bill	970-12420	02/20/2023		wall fabric/ w...	4420.00 · Maint - S...	-26.42
Bill	970-12420	02/22/2023		coffee	4190.03 · Paper & ...	-27.84
				Waste mana...	4430.19 · Garbage ...	-443.46
				hibu	4190.08 · Marketing	-20.00
Bill	170064	02/28/2023		fuel	4430.03 · Maint - Tr...	-164.91
				fuel	4430.03 · Maint - Tr...	-164.91
Bill	970-12420	02/28/2023		soap 7 gfi	4420.00 · Maint - S...	-96.95
Bill	970-12420	02/28/2023		water lines	4420.00 · Maint - S...	-23.92
Bill	970-12420	03/01/2023		copies	4190.01 · Printing	-122.75
				copies	4190.01 · Printing	-122.75
Bill	970-12420	03/01/2023		buildium serv...	4530.00 · Bank Fees	-54.84
Bill	970-12420	03/02/2023		blinds/ silicon...	4420.00 · Maint - S...	-107.38
Bill	169935	03/08/2023		mailings	4190.02 · Postage	-11.44
				printing	4190.01 · Printing	-16.64
Bill	970-12420	03/08/2023		connectors	4420.00 · Maint - S...	-45.96
				drill bits/glue	4420.00 · Maint - S...	-10.27
Bill	170283	03/17/2023		snow remova...	4430.11 · Snow Re...	-95.10
TOTAL						-1,555.54
Bill Pmt -Check	7066	03/23/2023	FEDEX	mailing	1111.01 · General ...	
Bill	8-069-24366	03/15/2023		Mailings - UV...	4190.02 · Postage	-43.24
TOTAL						-43.24
Bill Pmt -Check	7067	03/23/2023	GREEN BAY WAT...	mm	1111.01 · General ...	
Bill	2/27/23-4665-01	02/27/2023		1424 Admiral	4390.00 · Other Util...	-388.00
				1424 Admiral	4310.00 · Water	-3,136.96
TOTAL						-3,524.96
Bill Pmt -Check	7068	03/23/2023	KONE INC	mm	1111.01 · General ...	
Bill	962465639	03/01/2023		maint agree...	4430.12 · Elevator ...	-910.00
TOTAL						-910.00
Bill Pmt -Check	7069	03/23/2023	MID-STATE SUPPLY	409 N Maple	1111.01 · General ...	
Bill	4563304	03/08/2023		cabinets	4420.00 · Maint - S...	-147.00
TOTAL						-147.00
Bill Pmt -Check	7070	03/23/2023	One Service LLC		1111.01 · General ...	
Bill	559	03/01/2023		rodent servic...	4430.17 · Extermin...	-155.00
Bill	560	03/01/2023		bed bug treat...	4430.17 · Extermin...	-120.00
Bill	563	03/13/2023		815 dousma...	4430.17 · Extermin...	-90.00
Bill	564	03/17/2023		bed bug treat...	4430.17 · Extermin...	-120.00
TOTAL						-485.00
Bill Pmt -Check	7071	03/23/2023	TIME WARNER CA...	mm	1111.01 · General ...	
Bill	0366595030123	03/01/2023		cable fees	4230.00 · Ten Ser...	-7,045.44
TOTAL						-7,045.44

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

March 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
Bill Pmt -Check	7072	03/23/2023	Twin Eagle Holdin...	mm	1111.01 · General ...	
Bill	159683	03/08/2023		1424 Admiral	4330.00 · Gas	-7,499.04
TOTAL						-7,499.04
Bill Pmt -Check	7073	03/23/2023	WISCONSIN PUBL...		1111.01 · General ...	
Bill	3/3/23-2671-00036	03/03/2023		1424 Admiral	4320.00 · Electricity	-1,346.81
Bill	3/3/23-2671-00002	03/03/2023		1424 Admiral	4320.00 · Electricity	-4,171.44
TOTAL						-5,518.25
Bill Pmt -Check	7074	03/27/2023	CITY OF GREEN B...		1111.01 · General ...	
Bill	970-12420	03/27/2023		copies	4190.01 · Printing	-66.19
				copies	4190.01 · Printing	-66.20
Bill	970-12420	03/27/2023		copies	4190.01 · Printing	-43.55
				copies	4190.01 · Printing	-43.54
Bill	970-12420	03/27/2023		WHEDA conf.	4140.00 · Staff Trai...	-300.00
TOTAL						-519.48

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

April 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
Bill Pmt -Check	7075	04/06/2023	ACE DRAIN & SE...	409 N Maple	1111.01 · General ...	
Bill	19714	02/28/2023		auger sewer	4430.16 · Plumbing	-180.00
TOTAL						-180.00
Bill Pmt -Check	7076	04/06/2023	AMA HEATING	mm	1111.01 · General ...	
Bill	J-641	03/14/2023		furnace 7 the...	4430.00 · Maint - C...	-4,162.00
TOTAL						-4,162.00
Bill Pmt -Check	7077	04/06/2023	AT&T	door system	1111.01 · General ...	
Bill	3/22/2023	03/22/2023		door system	4190.07 · Tele Fax...	-61.23
				door system	4190.07 · Tele Fax...	-61.22
TOTAL						-122.45
Bill Pmt -Check	7078	04/06/2023	BELSON CO	1424 Admiral	1111.01 · General ...	
Bill	459997	03/21/2023		garbage bag...	4420.00 · Maint - S...	-363.44
TOTAL						-363.44
Bill Pmt -Check	7079	04/06/2023	Brown County Plu...	837 christiana	1111.01 · General ...	
Bill	7191	03/30/2023		water heater	4430.18 · Appliances	-1,225.00
TOTAL						-1,225.00
Bill Pmt -Check	7080	04/06/2023	CEC	1424 Admiral	1111.01 · General ...	
Bill	398549	03/06/2023		alarm inspect...	4430.09 · Fire Prote...	-1,575.00
TOTAL						-1,575.00
Bill Pmt -Check	7081	04/06/2023	CELLCOM	cell bill	1111.01 · General ...	
Bill	626504	03/15/2023		cell bill	4190.07 · Tele Fax...	-44.91
				cell bill	4190.07 · Tele Fax...	-87.81
TOTAL						-132.72
Bill Pmt -Check	7082	04/06/2023	CITY OF GREEN B...		1111.01 · General ...	
Bill	970-12420	03/14/2023		stamps	4190.02 · Postage	-126.00
				stamps	4190.02 · Postage	-126.00
				bus passes &...	4220.01 · Ten Ser -...	-375.56
Bill	970-12420	03/16/2023		keys/ elements	4420.00 · Maint - S...	-70.69
				tape & seal s...	4420.00 · Maint - S...	-29.74
Bill	970-12420	03/20/2023		keys/fridge d...	4420.00 · Maint - S...	-229.33
				keys/Door/ k...	4420.00 · Maint - S...	-417.64
Bill	170402	03/22/2023		trash fee	4430.19 · Garbage ...	-61.00
Bill	170405	03/22/2023		trash fee	4430.19 · Garbage ...	-61.00
Bill	970-12420	03/22/2023		background c...	4130.01 · Investigat...	-14.08
				paper/ dry er...	4190.03 · Paper & ...	-16.38
				paper/ dry er...	4190.03 · Paper & ...	-16.38
				wastemanag...	4430.19 · Garbage ...	-443.46
				Hibu	4190.08 · Marketing	-20.00
Bill	970-12422	03/31/2023		Wages	4110.00 · Admin Sa...	-12,010.75
				Benefits	4182.00 · Employe...	-3,695.55

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

April 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
				Wages	4410.00 · Maint - L...	-14,534.54
				Benefits	4433.00 · Emp Ben...	-4,287.68
				Wages	4110.00 · Admin Sa...	-9,426.31
				Benefits	4182.00 · Employe...	-3,027.95
				Wages	4410.00 · Maint - L...	-4,299.72
				Benefits	4433.00 · Emp Ben...	-1,127.04
				Wages	4110.00 · Admin Sa...	-7,400.49
				Benefits	4182.00 · Employe...	-2,418.37
TOTAL						-64,235.66
Bill Pmt -Check	7083	04/06/2023	ELAND ELECTRIC	1424 Admiral	1111.01 · General ...	
Bill	103596	03/29/2023		fix door oper...	4420.00 · Maint - S...	-368.95
TOTAL						-368.95
Bill Pmt -Check	7084	04/06/2023	Ka Vang		1111.01 · General ...	
Bill	10/1-12/31/22 mile...	12/31/2022		mileage	4150.00 · Travel	-14.38
Bill	1/1-3/31/23 mileage	03/31/2023		mileage	4150.00 · Travel	-27.51
				mileage	4150.00 · Travel	-15.72
TOTAL						-57.61
Bill Pmt -Check	7085	04/06/2023	LARSON PAINTING	1341 Univeri...	1111.01 · General ...	
Bill	6057	04/03/2023		painting 1341...	4430.00 · Maint - C...	-937.98
TOTAL						-937.98
Bill Pmt -Check	7086	04/06/2023	LIZER LAWN CARE		1111.01 · General ...	
Bill	130600AD	03/20/2023		Mowing - May	4430.13 · Landscap...	-70.00
Bill	132741AD	03/20/2023		mowing - june	4430.13 · Landscap...	-140.00
TOTAL						-210.00
Bill Pmt -Check	7087	04/06/2023	Overhead Door Co...	1341 Univer...	1111.01 · General ...	
Bill	BAY2654366	03/27/2023		repair garage...	4420.00 · Maint - S...	-125.00
TOTAL						-125.00
Bill Pmt -Check	7088	04/06/2023	TIME WARNER CA...	mm	1111.01 · General ...	
Bill	0437255031823	03/18/2023		wifi	4230.00 · Ten Ser-...	-179.98
TOTAL						-179.98
Bill Pmt -Check	7089	04/06/2023	WISCONSIN PUBL...		1111.01 · General ...	
Bill	3/14/23-2671-00009	03/14/2023		1125 University	4320.00 · Electricity	-40.96
				1125 University	4330.00 · Gas	-104.69
Bill	3/30/23-2671-00002	03/30/2023		1424 Admiral	4320.00 · Electricity	-4,002.68
Bill	3/30/23-2671-00036	03/30/2023		1424 Admiral	4320.00 · Electricity	-970.89
TOTAL						-5,119.22

11:45 AM

05/09/23

Green Bay Housing Authority

Check Detail

April 2023

Type	Num	Date	Name	Memo	Account	Paid Amount
Bill Pmt -Check	7090	04/19/2023	CITY OF GREEN B...		1111.01 · General ...	
Bill	970-12420	03/28/2023		handle/keys/...	4420.00 · Maint - S...	-524.24
Bill	170943	03/31/2023		fuel	4430.03 · Maint - Tr...	-170.20
				fuel	4430.03 · Maint - Tr...	-170.21
Bill	970-12420	04/01/2023		cc fees	4530.00 · Bank Fees	-62.81
Bill	970-12420	04/04/2023		check valve/k...	4420.00 · Maint - S...	-412.79
Bill	970-12420	04/05/2023		shelves	4420.00 · Maint - S...	-109.98
Bill	170897	04/06/2023		mailings	4190.02 · Postage	-6.24
Bill	970-12420	04/07/2023		copies/ printing	4190.01 · Printing	-71.30
				copies/ printing	4190.01 · Printing	-71.31
TOTAL						-1,599.08
Bill Pmt -Check	7091	04/19/2023	Commercial Laun...	mm	1111.01 · General ...	
Bill	12048	04/11/2023		washers & dr...	4430.25 · Unit Repair	-15,324.00
TOTAL						-15,324.00
Bill Pmt -Check	7092	04/19/2023	GREEN BAY WAT...		1111.01 · General ...	
Bill	3/30/23-4665-001	03/30/2023		1424 Admiral	4390.00 · Other Util...	-388.00
				1424 Admiral	4310.00 · Water	-2,962.89
Bill	3/31/23-32063-01	03/31/2023		Private fire line	4390.00 · Other Util...	-141.30
TOTAL						-3,492.19
Bill Pmt -Check	7093	04/19/2023	KONE INC	mm	1111.01 · General ...	
Bill	871008397	04/01/2023		maint agree...	4430.12 · Elevator ...	-910.00
TOTAL						-910.00
Bill Pmt -Check	7094	04/19/2023	LITURGICAL PUB...	mm	1111.01 · General ...	
Bill	753665	03/30/2023		ad space	4190.08 · Marketing	-949.00
TOTAL						-949.00
Bill Pmt -Check	7095	04/19/2023	One Service LLC		1111.01 · General ...	
Bill	470	08/17/2022		bed bug treat...	4430.17 · Extermin...	-235.00
Bill	472	08/19/2022		1416 Univers...	4430.17 · Extermin...	-80.00
Bill	571	03/31/2023		bed bug treat...	4430.17 · Extermin...	-215.00
TOTAL						-530.00
Bill Pmt -Check	7096	04/19/2023	TEAM APPAREL &...	uniforms	1111.01 · General ...	
Bill	130145	04/03/2023		shirts	4420.00 · Maint - S...	-266.00
				shirts	4420.00 · Maint - S...	-266.00
TOTAL						-532.00

CITY OF GREEN BAY BID SUMMARY
RFB #2023-05 - Commercial Washer and Dryers for Mason Mason

DEPT: GBHA - Mason Manor		VENDOR #1		VENDOR #2		VENDOR #2	
Planholders: 5 Vendors		CC# 500-045		INDOFF - ALLIED APPLIANCE		INDOFF - ALLIED APPLIANCE	
ISSUED: 2/2/23		DUE: 2/23/23		Green Bay		Maryland Heights MO	
DESCRIPTION		UNIT	PRICE	UNIT	PRICE	UNIT	PRICE
YEAR/BRAND/MODEL WASHER:		2023 Speed Queen SWNSX25P115TWO2		Speed Queen SWNNC2SP115TW01		Alternate: Whirlpool CAE2745FQ	
7 EA	WASHERS INCLUDING DELIVERY/SET-UP:	\$ 1,416.00	\$ 9,912.00	\$ 1,645.00	\$ 11,515.00	\$ 1,069.00	\$ 7,483.00
TOTAL PRICE TRADE-IN ALLOWANCES ON WASHERS:			\$ (1,050.00)				
TOTAL NET COST WASHERS INCL TRADE-IN ALLOWANCES:			\$ 8,862.00		\$ 11,515.00		\$ 7,483.00
YEAR/BRAND/MODEL DRYERS:		2023 Speed Queen SDG		Speed Queen SDGNCRGS113TW01		Alternate: Whirlpool CGM2745FQ	
6 EA	DRYERS INCLUDING DELIVERY/SET-UP:	\$ 1,177.00	\$ 7,062.00	\$ 1,325.00	\$ 7,950.00	\$ 1,019.00	\$ 6,114.00
TOTAL PRICE TRADE-IN ALLOWANCES ON DRYERS:			\$ (600.00)				
TOTAL NET COST DRYERS INCL TRADE-IN ALLOWANCES:			\$ 6,462.00		\$ 7,950.00		\$ 6,114.00
FREIGHT:					\$ 1,164.00		\$ 650.00
TOTAL COST WASHERS & DRYERS INCL TRADE IN ALLOWANCES:			\$ 15,324.00		\$ 20,629.00		\$ 14,247.00
LEAD TIME:		1-2 Weeks		-		-	
PAYMENT TERMS: NET 30 EARLY PAYMENT DISCOUNT:		Net 30		-		-	
COMPANY ACCEPTS P-CARD PAYMENTS:		Yes		-		-	
BID COMPLIANT:		Yes		No		No	

Non-Compliance: Indoff-Applied Appliance did not respond on City Bid form, incomplete information, no trade allowance and price does not include required set up

Recommendation: Award to the lowest responsive, responsible vendor Commercial Laundry

Green Bay Housing Authority Budget vs. Actual Summary Green Bay Housing Authority

Apr-23

	COCC		Mason Manor		RevBonds		TOTAL	
	YTD	Budget	YTD	Budget	YTD	Budget	YTD	Budget
Total Income	154,810.55	180,710.80	773,839.83	863,475.00	63,345.92	11,790.00	991,996.30	1,055,975.80
Total Expense	98,752.12	152,200.00	698,336.76	1,028,997.84	937.54	4,700.00	798,026.42	1,185,897.84
Net Income	56,058.43	28,510.80	75,503.07	-165,522.84	62,408.38	7,090.00	193,969.88	-129,922.04

Reserve Spreadsheet

	MM
2022 Audited Report	1,125,950
YTD Net Income/(loss)	75,503
Without Depreciation	
Committed Funds	(150,000)
Remaining Projects	-
Subtotal	1,051,453
Transfer	-
Projected Reserve	1,051,453
6 Month Expenses	455,052
Excess/shortfall	596,402
	😊

Green Bay Housing Authority Budget vs. Actual Detail

	COCC				Mason Manor			
	YTD	Budget	\$ Over Budget	% of Budget	YTD	Budget	\$ Over Budget	% of Budget
Income								
2802.00 · Hud Contributions	0.00	0.00	0.00	0.0%	183,523.00	175,000.00	8,523.00	104.87%
3110.00 · Dwelling Rental	0.00	0.00	0.00	0.0%	418,390.84	519,000.00	-100,609.16	80.62%
3120.00 · Excess Utilities	0.00	0.00	0.00	0.0%	4,096.00	5,000.00	-904.00	81.92%
3510.00 · Management Fee Revenue	118,610.94	138,580.80	129,864.00	85.59%	0.00	0.00	0.00	0.0%
3520.00 · Asset Management Rev	20,100.00	24,000.00	24,000.00	83.75%	0.00	0.00	0.00	0.0%
3530.00 · BookKeeping Fee Rev	14,895.00	18,000.00	18,000.00	82.75%	0.00	0.00	0.00	0.0%
3610.00 · Int Income	0.00	30.00	2,500.00	0.0%	56,280.77	75.00	56,205.77	75,041.03%
3690.00 · Other Income - Tenants	0.00	0.00	0.00	0.0%	3,305.00	5,000.00	-1,695.00	66.1%
3690.01 · Other Income - Ins Dividends	159.52	100.00	15.00	159.52%	4,306.65	7,500.00	-3,193.35	57.42%
3690.02 · Other Income	1,045.09	0.00	1,045.09	100.0%	19,537.71	11,500.00	8,037.71	169.89%
3690.03 · Cell Tower Rent	0.00	0.00	0.00	0.0%	84,399.86	140,400.00	-56,000.14	60.11%
9110.00 · Transfers In	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
Total Income	154,810.55	180,710.80	-25,900.25	85.67%	773,839.83	863,475.00	-89,635.17	89.62%
Expense								
4110.00 · Admin Salaries	56,558.49	70,000.00	-13,441.51	80.8%	86,154.58	110,500.00	-24,345.42	77.97%
4120.00 · Compensated Absences	0.00	0.00	0.00	0.0%	0.00	500.00	-500.00	0.0%
4130.00 · Legal Expense	0.00	6,000.00	-6,000.00	0.0%	400.44	1,500.00	-1,099.56	26.7%
4130.01 · Investigations Expense	0.00	0.00	0.00	0.0%	56.16	2,600.00	-2,543.84	2.16%
4140.00 · Staff Training	1,589.97	9,000.00	-7,410.03	17.67%	79.00	5,000.00	-4,921.00	1.58%
4150.00 · Travel	113.71	200.00	-86.29	56.86%	145.22	250.00	-104.78	58.09%
4160.00 · Management Fee	0.00	0.00	0.00	0.0%	90,774.40	105,627.84	-14,853.44	85.94%
4163.00 · BookKeeping Fee	0.00	0.00	0.00	0.0%	11,400.00	13,680.00	-2,280.00	83.33%
4165.00 · Asset Management Fee	0.00	0.00	0.00	0.0%	15,300.00	18,240.00	-2,940.00	83.88%
4171.00 · Auditing Fees	2,166.00	1,950.00	216.00	111.08%	4,332.00	3,850.00	482.00	112.52%
4182.00 · Employee Benefits - Admin	22,027.53	30,500.00	-8,472.47	72.22%	31,379.06	44,500.00	-13,120.94	70.52%
4190.01 · Printing	39.60	300.00	-260.40	13.2%	794.92	1,000.00	-205.08	79.49%
4190.02 · Postage	186.26	300.00	-113.74	62.09%	426.00	1,100.00	-674.00	38.73%
4190.03 · Paper & Office Supplies	150.17	900.00	-749.83	16.69%	1,217.85	1,000.00	217.85	121.79%
4190.04 · Publications	0.00	300.00	-300.00	0.0%	0.00	0.00	0.00	0.0%
4190.05 · Membership Dues & Fees	70.00	400.00	-330.00	17.5%	239.00	0.00	239.00	100.0%
4190.06 · Computer Support	2,066.59		2,066.59	100.0%	7,233.09	15,000.00	-7,766.91	48.22%
4190.07 · Tele Fax & Comm	0.00	0.00	0.00	0.0%	1,830.43	2,250.00	-419.57	81.35%
4190.08 · Marketing	0.00	3,000.00	-3,000.00	0.0%	1,129.00	2,300.00	-1,171.00	49.09%
4190.10 · Miscellaneous	12,381.02	15,000.00	-2,618.98	82.54%	1,358.46	1,500.00	-141.54	90.56%
4220.00 · Ten Ser-Recr Etc	0.00	0.00	0.00	0.0%	28.45	200.00	-171.55	14.23%
4220.01 · Ten Ser - Resident Part	0.00	0.00	0.00	0.0%	2,892.82	2,900.00	-7.18	99.75%
4230.00 · Ten Ser-Contrs	0.00	0.00	0.00	0.0%	40,550.08	26,800.00	13,750.08	151.31%
4310.00 · Water	0.00	0.00	0.00	0.0%	31,630.56	42,000.00	-10,369.44	75.31%
4320.00 · Electricity	0.00	0.00	0.00	0.0%	58,477.05	66,000.00	-7,522.95	88.6%
4330.00 · Gas	0.00	0.00	0.00	0.0%	41,027.78	28,500.00	12,527.78	143.96%
4390.00 · Other Utilities	0.00	0.00	0.00	0.0%	4,271.08	6,000.00	-1,728.92	71.19%
4410.00 · Maint - Labor	0.00	0.00	0.00	0.0%	106,302.05	133,000.00	-26,697.95	79.93%
4420.00 · Maint - Supplies	0.00	100.00	-100.00	0.0%	11,521.43	18,000.00	-6,478.57	64.01%
4430.00 · Maint - Contracts	0.00	0.00	0.00	0.0%	14,333.82	20,000.00	-5,666.18	71.67%
4430.01 · Maint - Non-Contract	0.00	0.00	0.00	0.0%	3,528.18	10,000.00	-6,471.82	35.28%
4430.03 · Maint - Truck Maint	2.58	100.00	-97.42	2.58%	4,481.88	3,000.00	1,481.88	149.4%
4430.09 · Fire Protection - Maint	0.00	0.00	0.00	0.0%	5,337.38	4,200.00	1,137.38	127.08%
4430.10 · Heating and Cooling	0.00	0.00	0.00	0.0%	3,705.78	6,500.00	-2,794.22	57.01%
4430.11 · Snow Removal	0.00	0.00	0.00	0.0%	1,111.77	6,500.00	-5,388.23	17.1%
4430.12 · Elevator Maintenance	0.00	0.00	0.00	0.0%	11,112.44	14,500.00	-3,387.56	76.64%
4430.13 · Landscape and Grounds	0.00	0.00	0.00	0.0%	1,853.59	1,500.00	353.59	123.57%
4430.14 · Unit Turnaround	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4430.15 · Electrical	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4430.16 · Plumbing	0.00	0.00	0.00	0.0%	1,542.65	1,500.00	42.65	102.84%
4430.17 · Extermination	0.00	0.00	0.00	0.0%	13,192.14	22,000.00	-8,807.86	59.96%
4430.18 · Appliances	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4430.19 · Garbage & Trash Removal	0.00	0.00	0.00	0.0%	3,871.72	6,000.00	-2,128.28	64.53%
4430.25 · Unit Repair	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4432.00 · Extraordinary Maintenance	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4433.00 · Emp Ben Contr-ord maint	0.00	0.00	0.00	0.0%	36,389.50	42,500.00	-6,110.50	85.62%
4480.00 · Protect Service	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4510.00 · Insurance Expense - Property	0.00	0.00	0.00	0.0%	38,799.00	36,000.00	2,799.00	107.78%
4510.01 · Insurance Expenses - Liability	600.00	400.00	200.00	150.0%	8,126.00	8,000.00	126.00	101.58%
4520.00 · PILOT	0.00	0.00	0.00	0.0%	0.00	38,000.00	-38,000.00	0.0%
4530.00 · Bank Fees	800.20	1,100.00	-299.80	72.75%	0.00	0.00	0.00	0.0%
4572.00 · Bad Debt - Tenant Rents	0.00	0.00	0.00	0.0%	0.00	5,000.00	-5,000.00	0.0%
4590.00 · Other General	0.00	12,000.00	-12,000.00	0.0%	0.00	0.00	0.00	0.0%
4600.00 · Leases	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4800.00 · Depreciation Expense	0.00	650.00	-650.00	0.0%	0.00	150,000.00	-150,000.00	0.0%
9120.00 · Transfers Out	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
Total Expense	98,752.12	152,200.00	-53,447.88	64.88%	698,336.76	1,028,997.84	-330,661.08	67.87%
Net Income/(Loss)	56,058.43	28,510.80	27,547.63	196.62%	75,503.07	-165,522.84	241,025.91	-45.62%

Green Bay Housing Authority Budget vs. Actual Detail

	RevBonds				TOTAL			
	YTD	Budget	\$ Over Budget	% of Budget	YTD	Budget	\$ Over Budget	% of Budget
Income								
2802.00 · Hud Contributions	0.00	0.00	0.00	0.0%	183,523.00	175,000.00	8,523.00	104.87%
3110.00 · Dwelling Rental	0.00	0.00	0.00	0.0%	418,390.84	519,000.00	-100,609.16	80.62%
3120.00 · Excess Utilities	0.00	0.00	0.00	0.0%	4,096.00	5,000.00	-904.00	81.92%
3510.00 · Management Fee Revenue	0.00	0.00	0.00	0.0%	118,610.94	138,580.80	-19,969.86	85.59%
3520.00 · Asset Management Rev	0.00	0.00	0.00	0.0%	20,100.00	24,000.00	-3,900.00	83.75%
3530.00 · BookKeeping Fee Rev	0.00	0.00	0.00	0.0%	14,895.00	18,000.00	-3,105.00	82.75%
3610.00 · Int Income	0.00	75.00	-75.00	0.0%	56,280.77	180.00	56,100.77	31,267.09%
3690.00 · Other Income - Tenants	0.00	0.00	0.00	0.0%	3,305.00	5,000.00	-1,695.00	66.1%
3690.01 · Other Income - Ins Dividends	0.00	0.00	0.00	0.0%	4,466.17	7,600.00	-3,133.83	58.77%
3690.02 · Other Income	63,345.92	11,715.00	51,630.92	540.73%	83,928.72	23,215.00	60,713.72	361.53%
3690.03 · Cell Tower Rent	0.00	0.00	0.00	0.0%	84,399.86	140,400.00	-56,000.14	60.11%
9110.00 · Transfers In	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
Total Income	63,345.92	11,790.00	51,555.92	537.29%	991,996.30	1,055,975.80	-63,979.50	93.94%
Expense								
4110.00 · Admin Salaries	81.69	550.00	-468.31	14.85%	142,794.76	181,050.00	-38,255.24	78.87%
4120.00 · Compensated Absences	0.00	0.00	0.00	0.0%	0.00	500.00	-500.00	0.0%
4130.00 · Legal Expense	0.00	0.00	0.00	0.0%	400.44	7,500.00	-7,099.56	5.34%
4130.01 · Investigations Expense	0.00	0.00	0.00	0.0%	56.16	2,600.00	-2,543.84	2.16%
4140.00 · Staff Training	0.00	0.00	0.00	0.0%	1,668.97	14,000.00	-12,331.03	11.92%
4150.00 · Travel	0.00	0.00	0.00	0.0%	258.93	450.00	-191.07	57.54%
4160.00 · Management Fee	0.00	0.00	0.00	0.0%	90,774.40	105,627.84	-14,853.44	85.94%
4163.00 · BookKeeping Fee	0.00	0.00	0.00	0.0%	11,400.00	13,680.00	-2,280.00	83.33%
4165.00 · Asset Management Fee	0.00	0.00	0.00	0.0%	15,300.00	18,240.00	-2,940.00	83.88%
4171.00 · Auditing Fees	570.00	400.00	170.00	142.5%	7,068.00	6,200.00	868.00	114.0%
4182.00 · Employee Benefits - Admin	35.89	250.00	-214.11	14.36%	53,442.48	75,250.00	-21,807.52	71.02%
4190.01 · Printing	0.00	0.00	0.00	0.0%	834.52	1,300.00	-465.48	64.19%
4190.02 · Postage	0.00	0.00	0.00	0.0%	612.26	1,400.00	-787.74	43.73%
4190.03 · Paper & Office Supplies	0.00	0.00	0.00	0.0%	1,368.02	1,900.00	-531.98	72.0%
4190.04 · Publications	5.57	0.00	5.57	100.0%	5.57	300.00	-294.43	1.86%
4190.05 · Membership Dues & Fees	0.00	0.00	0.00	0.0%	309.00	400.00	-91.00	77.25%
4190.06 · Computer Support	0.00	0.00	0.00	0.0%	9,299.68	15,000.00	-5,700.32	62.0%
4190.07 · Tele Fax & Comm	0.00	0.00	0.00	0.0%	1,830.43	2,250.00	-419.57	81.35%
4190.08 · Marketing	0.00	3,000.00	-3,000.00	0.0%	1,129.00	8,300.00	-7,171.00	13.6%
4190.10 · Miscellaneous	0.00	500.00	-500.00	0.0%	13,739.48	17,000.00	-3,260.52	80.82%
4220.00 · Ten Ser-Recr Etc	0.00	0.00	0.00	0.0%	28.45	200.00	-171.55	14.23%
4220.01 · Ten Ser - Resident Part	0.00	0.00	0.00	0.0%	2,892.82	2,900.00	-7.18	99.75%
4230.00 · Ten Ser-Contrs	0.00	0.00	0.00	0.0%	40,550.08	26,800.00	13,750.08	151.31%
4310.00 · Water	0.00	0.00	0.00	0.0%	31,630.56	42,000.00	-10,369.44	75.31%
4320.00 · Electricity	0.00	0.00	0.00	0.0%	58,477.05	66,000.00	-7,522.95	88.6%
4330.00 · Gas	0.00	0.00	0.00	0.0%	41,027.78	28,500.00	12,527.78	143.96%
4390.00 · Other Utilities	0.00	0.00	0.00	0.0%	4,271.08	6,000.00	-1,728.92	71.19%
4410.00 · Maint - Labor	0.00	0.00	0.00	0.0%	106,302.05	133,000.00	-26,697.95	79.93%
4420.00 · Maint - Supplies	0.00	0.00	0.00	0.0%	11,521.43	18,100.00	-6,578.57	63.65%
4430.00 · Maint - Contracts	0.00	0.00	0.00	0.0%	14,333.82	20,000.00	-5,666.18	71.67%
4430.01 · Maint - Non-Contract	0.00	0.00	0.00	0.0%	3,528.18	10,000.00	-6,471.82	35.28%
4430.03 · Maint - Truck Maint	0.00	0.00	0.00	0.0%	4,484.46	3,100.00	1,384.46	144.66%
4430.09 · Fire Protection - Maint	0.00	0.00	0.00	0.0%	5,337.38	4,200.00	1,137.38	127.08%
4430.10 · Heating and Cooling	0.00	0.00	0.00	0.0%	3,705.78	6,500.00	-2,794.22	57.01%
4430.11 · Snow Removal	0.00	0.00	0.00	0.0%	1,111.77	6,500.00	-5,388.23	17.1%
4430.12 · Elevator Maintenance	0.00	0.00	0.00	0.0%	11,112.44	14,500.00	-3,387.56	76.64%
4430.13 · Landscape and Grounds	0.00	0.00	0.00	0.0%	1,853.59	1,500.00	353.59	123.57%
4430.14 · Unit Turnaround	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4430.15 · Electrical	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4430.16 · Plumbing	0.00	0.00	0.00	0.0%	1,542.65	1,500.00	42.65	102.84%
4430.17 · Extermination	0.00	0.00	0.00	0.0%	13,192.14	22,000.00	-8,807.86	59.96%
4430.18 · Appliances	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4430.19 · Garbage & Trash Removal	0.00	0.00	0.00	0.0%	3,871.72	6,000.00	-2,128.28	64.53%
4430.25 · Unit Repair	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4432.00 · Extraordinary Maintenance	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4433.00 · Emp Ben Contr-ord maint	0.00	0.00	0.00	0.0%	36,389.50	42,500.00	-6,110.50	85.62%
4480.00 · Protect Service	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4510.00 · Insurance Expense - Property	0.00	0.00	0.00	0.0%	38,799.00	36,000.00	2,799.00	107.78%
4510.01 · Insurance Expenses - Liability	0.00	0.00	0.00	0.0%	8,726.00	8,400.00	326.00	103.88%
4520.00 · PILOT	0.00	0.00	0.00	0.0%	0.00	38,000.00	-38,000.00	0.0%
4530.00 · Bank Fees	0.00	0.00	0.00	0.0%	800.20	1,100.00	-299.80	72.75%
4572.00 · Bad Debt - Tenant Rents	0.00	0.00	0.00	0.0%	0.00	5,000.00	-5,000.00	0.0%
4590.00 · Other General	0.00	0.00	0.00	0.0%	0.00	12,000.00	-12,000.00	0.0%
4600.00 · Leases	0.00	0.00	0.00	0.0%	0.00	0.00	0.00	0.0%
4800.00 · Depreciation Expense	0.00	0.00	0.00	0.0%	0.00	150,650.00	-150,650.00	0.0%
9120.00 · Transfers Out	244.39	0.00	244.39	100.0%	244.39	0.00	244.39	100.0%
Total Expense	937.54	4,700.00	-3,762.46	19.95%	798,026.42	1,185,897.84	-387,871.42	67.29%
Net Income/(Loss)	62,408.38	7,090.00	55,318.38	880.23%	193,969.88	-129,922.04	323,891.92	-149.3%

Green Bay Housing Authority
Capital Funds Program Report
April-23

	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
Mason Manor	0.00	0.00	0.00	0.00	226,988.32	226,988.32
Admin	0.00	0.00	0.00	0.00	22,942.65	22,942.65
	-	-	-	-	249,930.97	<u>249,930.97</u>

Obligation Date	4/12/2017	4/12/2018	8/15/2019	5/28/2020	4/15/2021
Grant End Date	4/12/2019	4/12/2020	8/15/2021	5/28/2022	4/15/2025

Grant Amount \$ 187,845 \$ 190,918 \$ 207,049 \$ 320,213 \$ 330,432

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	
Mason Manor	323,071.87	345,708.00	424,126.00	427,080.00	0.00	1,519,985.87

Obligation Date	3/25/2022	2/22/2023	5/11/2024	2/16/2025
Grant End Date	3/25/2026	2/22/2025	5/11/2026	2/16/2027

Grant Amount \$ 326,808 \$ 345,708 \$ 424,126 \$ 427,080

Total CFP Dollars
\$ 1,769,916.84



1723 Murphy Court, Green Bay, WI 54303 • Phone: 920-494-9910 • www.LanganAndAssociates.com

December 1, 2022

Jayne Valentine
Senior Property Manager
Housing Authority of City of Green Bay
1424 Admiral Court
Green Bay, WI 54303

Re: Monthly Report:

Ms. Valentine,

For the month of November 2022 there were **no** Green Bay Housing applications reviewed by Langan and Associates. It was:

- 0 Applications for Mason Manor.
- 0 Applications for Scattered Sites.

Should there be any questions please feel free to contact me at (920) 639-6667.

Respectfully submitted,

Ken Brodhagen

Ken Brodhagen, Investigator
Langan & Associates, Inc.

This document is confidential and intended for the use of the listed recipient only.

GREEN BAY HOUSING AUTHORITY
FEBRUARY 2023

MASON MANOR VACANCIES (23 TOTAL)					
UNIT	MOVEOUT	BEDRM	NEW LEASE	MOVE OUT REASON	CURRENT STATUS OF UNIT
###	1/31/22	1	HOLD OPEN FOR RENOVATION	DECEASED	HOLD VACANT FOR REMODEL
###	2/11/22	1		MOVED OUT OF STATE	HOLD VACANT FOR REMODEL
###	3/31/22	1		IN HOUSE TRANSFER	HOLD VACANT FOR REMODEL
###	4/13/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	4/15/22	1		EVICITION	HOLD VACANT FOR REMODEL
###	4/18/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	6/30/22	2		IN HOUSE TRANSFER	HOLD VACANT FOR REMODEL
###	7/1/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	7/31/22	1		EVICITION	HOLD VACANT FOR REMODEL
###	8/19/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	8/31/22	1		MOVED TO ASSISTED LIVING	HOLD VACANT FOR REMODEL
###	9/30/22	2		MOVED OUT OF STATE	HOLD VACANT FOR REMODEL
###	9/30/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	10/1/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	10/1/22	1		IN HOUSE TRANSFER	HOLD VACANT FOR REMODEL
###	10/31/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	11/30/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	12/31/22	1		MOVED TO DIFFENT APT.	HOLD VACANT FOR REMODEL
###	12/31/22	2		TRANSFERRED TO SS	HOLD VACANT FOR REMODEL
###	1/6/23	1		MOVED OUT OF GB	HOLD VACANT FOR REMODEL
###	1/31/23	1		EVICITION-NONPAYMENT RENT	HOLD VACANT FOR REMODEL
###	1/31/23	1		NON RENEWAL OF LEASE	HOLD VACANT FOR REMODEL
###	2/2/23	1		EVICITION-NONPAYMENT RENT	HOLD VACANT FOR REMODEL
UPCOMING VACANCIES			APPLICATIONS INFO		
MASON MANOR (3 TOTAL)			MM APPLICANTS:	TOTAL	
UNIT	STATUS		1 bedroom (69-BC; 29-non BC)	98	
###	30 DAY NOTICE VACATE		2 bedroom (1-BC; 1-non BC)	2	
###	DECEASED				
###	30 DAY NOTICE VACATE				

OCCUPANY RATES			HUD
MM			MM
Feb	98.03%		98.68%
Mar	98.03%		98.03%
Apr	98.03%		99.34%
May	96.05%		98.03%
June	96.05%		98.03%
July	94.74%		98.03%
August	93.42%		96.05%
September	92.11%		96.05%
October	90.79%		100.00%
November	89.47%		100.00%
December	88.82%		100.00%
January	88.82%		100.00%
TOTAL	93.70%		98.52%

GREEN BAY HOUSING AUTHORITY
MAY 2023

MASON MANOR VACANCIES (29 TOTAL)					
UNIT	MOVEOUT	BEDRM	NEW LEASE	MOVE OUT REASON	CURRENT STATUS OF UNIT
###	1/31/22	1	HOLD OPEN FOR RENOVATION	DECEASED	HOLD VACANT FOR REMODEL
###	2/11/22	1		MOVED OUT OF STATE	HOLD VACANT FOR REMODEL
###	3/31/22	1		IN HOUSE TRANSFER	HOLD VACANT FOR REMODEL
###	4/13/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	4/15/22	1		EVICTON	HOLD VACANT FOR REMODEL
###	4/18/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	6/30/22	2		IN HOUSE TRANSFER	HOLD VACANT FOR REMODEL
###	7/1/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	7/31/22	1		EVICTON	HOLD VACANT FOR REMODEL
###	8/19/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	8/31/22	1		MOVED TO ASSISTED LIVING	HOLD VACANT FOR REMODEL
###	9/30/22	2		MOVED OUT OF STATE	HOLD VACANT FOR REMODEL
###	9/30/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	10/1/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	10/1/22	1		IN HOUSE TRANSFER	HOLD VACANT FOR REMODEL
###	10/31/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	11/30/22	1		DECEASED	HOLD VACANT FOR REMODEL
###	12/31/22	1		MOVED TO DIFFENT APT.	HOLD VACANT FOR REMODEL
###	12/31/22	2		TRANSFERRED TO SS	HOLD VACANT FOR REMODEL
###	1/6/23	1		MOVED OUT OF GB	HOLD VACANT FOR REMODEL
###	1/31/23	1		EVICTON-NONPAYMENT RENT	HOLD VACANT FOR REMODEL
###	1/31/23	1		NON RENEWAL OF LEASE	HOLD VACANT FOR REMODEL
###	1/31/23	1		DECEASED	HOLD VACANT FOR REMODEL
###	2/2/23	1		EVICTON-NONPAYMENT RENT	HOLD VACANT FOR REMODEL
###	3/1/23	1		MOVED TO DIFFENT APT.	HOLD VACANT FOR REMODEL
###	3/3/22	1		MOVED TO LIVE WITH FAMILY	HOLD VACANT FOR REMODEL
###	3/10/23	1		EVICTON	HOLD VACANT FOR REMODEL
###	4/19/23	1		MOVED TO DIFFENT APT.	HOLD VACANT FOR REMODEL
###	5/1/23	1		EVICTON	HOLD VACANT FOR REMODEL
UPCOMING VACANCIES				APPLICATIONS INFO	
MASON MANOR (1 TOTAL)				MM APPLICANTS:	
	UNIT	STATUS		TOTAL	
	###	30 DAY NOTICE VACATE		1 bedroom (55-BC; 27-non BC) 82	

OCCUPANY RATES		HUD
MM		MM
May	96.05%	96.05%
June	96.05%	96.05%
July	94.74%	100.00%
August	93.42%	100.00%
September	92.11%	100.00%
October	90.79%	100.00%
November	89.47%	100.00%
December	88.82%	100.00%
January	88.82%	100.00%
February	86.18%	100.00%
March	85.53%	100.00%
April	83.55%	100.00%
TOTAL	90.46%	99.34%