

Supplement to HUD Form 50075-ST(1): Revision of PHA Plan Elements and New Activities

January 10, 2019

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Section B.1 Revision of PHA Plan Elements

1. Housing Needs of Families in the Jurisdiction/s Served by the PHA and Strategy for Addressing Housing Needs

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type									
Family Type*	Overall**	% of Overall*	Affordability	Supply	Quality	Accessibility	% Overcrowded*	Size	Location
Income <= 30% of AMI	68,580	54.8	5	3	2	2	N/A	1	N/A
Income >30% but <=50% of AMI	30,005	24.0	5	3	2	2	N/A	2	N/A
Income >50% but <80% of AMI	26,525	21.2	4	3	2	2	N/A	2	N/A
Elderly <80%	37,120	29.7	4	3	2	2	N/A	N/A	N/A
Families with Disabilities <100% of the poverty level***	24,844	31.6	3	4	2	2	N/A	N/A	N/A
White <80%****	33,145	41.2	4	3	2	2	N/A	N/A	N/A
Black African American Households <80%****	22,955	28.5	4	3	2	2	N/A	N/A	N/A
Hispanic Households <80%****	16,575	20.6	5	3	2	2	N/A	N/A	N/A
American Indian / Alaska Native <80%****	219	.3	5	3	2	2	N/A	N/A	N/A
Asian / Pacific Islander <80%****	7560	9.4	4	3	2	2	N/A	N/A	N/A
All Minority Households <80%****	47,309	58.8	4	3	2	2	N/A	N/A	N/A
All Households <80% AMI	125,110	100	4	3	2	2	N/A	1	N/A

*There is likely some overlap in the data. For example, elderly households will include

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persons with disabilities who are elderly and disabled families will include both single persons and persons with children.

**Overall renter households eligible for public housing, those below 80% of Area Median Income. Total Households = 125,110

***2017 American Community Survey 1-Year Estimates, U.S. Census Bureau, Selected Economic Characteristics for the Civilian Non-Institutionalized Population By Disability Status

****From Boston Consolidated Plan - based on 2009-2013 Comprehensive Housing Affordability Strategy (CHAS) has one of more of four housing problems: lacks complete kitchen or plumbing facilities, more than one person per room, or cost burden greater than 30%. Total = 80,454

X: Consolidated Plan of the Jurisdiction/s

Indicate year: 7/1/2018 to 6/30/2023.

X: U.S. Census data: the State of the Cities Data Systems: Comprehensive Housing Affordability Strategy (CHAS) dataset 2009-2013 as presented in Boston Consolidated Plan

__: American Housing Survey data Indicate year:

__: Other housing market study

Indicate year:

X: Other sources: (list and indicate year of information) Analysis conducted in consultation with staff from the City of Boston's Department of Neighborhood Development

B. Housing Needs of Families on the Public Housing and Section 8 Tenant- Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. Complete one table for each type of PHA-wide waiting list administered by the PHA. PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the Waiting List		
Waiting list type: (select one)		
<u>X</u> : Section 8 tenant-based assistance		
__: Public Housing		
__: Combined Section 8 and Public Housing		
__: Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development / sub-jurisdiction:		
	# of families	% of total families
Annual Turnover		
Waiting List total	503	50**

Extremely low income <=30%	446	88.67%
Very Low income (>30% but <=50% AMI)	48	9.54%
Low income (>50% but <80% AMI)	9	1.79%
Families with children*	252	50.10%
Elderly families*	32	6.36%
Families with Disabilities*	233	46.32%
White Hispanic	110	21.87%
White Non-Hispanic	99	19.68%
Black Hispanic	61	12.13%
Black Non-Hispanic	222	44.14%
American Indian Hispanic	2	0.40%
American Indian Non-Hispanic	2	0.40%
Asian/Pacific Island Hispanic	0	0.00%
Asian/Pacific Island Non-Hispanic	7	1.39%

* The BHA had Single applicants on the waiting list. In addition there were instances of families that fit into more than one category including disabled and minors; disabled and elderly; elderly and minors; and families that fit in all 3 categories.

**BHA ranked 7277 applications on its Section 8 Tenant-Based Waiting List based on the result of the lottery process when it re-opened the waiting list for two weeks in October 2008.

Is the waiting list closed (select one) No Yes

If yes:

HOW LONG HAS IT BEEN CLOSED? SINCE NOVEMBER 1, 2008

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed?

No Yes

Please Note: BHA implemented site-based waiting lists for Section 8 Project-Based and Moderate Rehabilitation Housing Programs effective May 2007 and the waiting lists are open

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for Priority One Applicants only, except for six Elderly/Disabled Section 8 Project-Based waiting lists that have been open to non-priority elderly 62 years of age and older effective May 9, 2014. In addition, the Section 8 Tenant Based waiting list is open for Super Priority, PBV participants switching to tenant-based vouchers after a year of tenancy in good standing, and Mitigation voucher applicants.

Housing Needs of Families on the Waiting List			
Waiting list type: (select one) <input type="checkbox"/> : Section 8 tenant-based assistance <input checked="" type="checkbox"/> : Public Housing <input type="checkbox"/> : Combined Section 8 and Public Housing <input type="checkbox"/> : Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development / sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	38,227		2300**
Extremely low income <=30% AMI	35,244	92.20%	
Very low income (>30% but <=50% AMI)	2,694	7.05%	
Low income (>50% but <80% AMI)	289	0.76%	
Families with children*	13,880	36.31%	
Elderly families*	4,360	11.41%	
Families with Disabilities*	9,582	25.07%	
White Hispanic***	9,312	24.36%	
White Non-Hispanic***	6,662	17.43%	
Black Hispanic***	2,553	6.68%	
Black Non-Hispanic***	14,744	38.57%	
American Indian Hispanic***	104	0.27%	
American Indian Non- Hispanic***	218	0.57%	
Asian/Pacific Island Hispanic***	130	0.34%	
Asian/Pacific Island Non-Hispanic***	4,503	11.78%	

*The BHA had Single applicants on the waiting list. In addition there were instances of families that fit into more than one category including duplicates in disabled and children; duplicates in disabled and elderly; duplicates in elderly and children; and families that fit all categories.

**The number of clients, BHA processed for final eligibility for public housing.

***The totals numbers for race/ethnicity are missing client records that do not indicate a race.

Characteristics by Bedroom Size (Public Housing)

Housing Needs of Families on the Waiting List

1BR	18,334	47.90%
2 BR	12,860	33.60%
3 BR	6129	16.01%
4 BR	822	2.15%
5 BR	123	0.32%
6+BR	6	0.02%

Is the waiting list closed (select one)? No Yes

If yes:

HOW LONG HAS IT BEEN CLOSED (# OF MONTHS)?

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes

Strategy for Addressing Housing Needs. Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. **Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan.**

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

1 Strategies

Need: Shortage of affordable housing for all eligible populations

Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:

Select all that apply

- : Employ effective maintenance and management policies to minimize the number of public housing units off-line
- : Reduce turnover time for vacated public housing units Reduce time to renovate public housing units
- : Seek replacement of public housing units lost to the inventory through mixed finance development
- : Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- : Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- : Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- : Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration

: Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program

: Participate in the Consolidated Plan development process to ensure coordination with broader community strategies

: Other (list below)

The BHA is engaging in partnerships with other agencies to better service the needs of our population and create family supported housing programs.

Strategy 2: Increase the number of affordable housing units by:

Select all that apply:

: Apply for additional section 8 units should they become available

: Leverage affordable housing resources in the community through the creation of mixed - finance housing

: Pursue housing resources other than public housing or Section 8 tenant-based assistance.

: Other: (list below)

Add market uses to sites where appropriate to help preserve affordable units 1:1.

Utilize Replacement Housing Factor Funding funds to create new public housing units. BHA is eager to pursue any and all sources for the preservation and/or creation of new public housing units. This may include private and public sources, funds for housing specific populations, funds for "green" (energy-efficient and healthy) affordable housing, etc. We welcome specific suggestions.

Need: Specific Family Types: Families at or below 30% of median

Strategy 1: Target available assistance to families at or below 30 % of AMI

Select all that apply

: Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing. *However, given the demographics of the public housing wait list it is anticipated that new admissions at or below 30% of median area income will significantly exceed 40%.*

: Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance. *However, given the demographics of the Section 8 Tenant-Based wait list, it is anticipated that new admissions at or below 30% of median area income will significantly exceed 40%.*

: Employ admissions preferences aimed at families with economic hardships

: Adopt rent policies to support and encourage work

: Other: (list below)

Need: Specific Family Types: Families at or below 50% of median

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Strategy 1: Target available assistance to families at or below 50% of AMI

Select all that apply

: Employ admissions preferences aimed at families who are working (in Leased Housing Programs)

: Adopt rent policies to support and encourage work

: Other: (list below)

HomeBase Program, Healthy Start in Housing, HOPWA, Housing Chronically Homeless Elders (age 62 or older), SAMHSA, BPS-Homeless Student Program, Health Starts At Home, Elder Living At Home Program –ELAHP, PACE in Public Housing; Moving On for the City of Boston, Rapid Rehousing Program, Leading the Way Home, City of Boston Coordinated Access System Referral and NED Program in Section 8

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

: Seek designation of public housing for the elderly

: Apply for special-purpose vouchers targeted to the elderly, should they become available

: Other: (list below)

Housing Chronically Homeless Elders (age 62 or older)

When possible, develop additional units for low-income elders

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

: Implementing preference for disabled persons in family public housing

: Apply for special-purpose vouchers targeted to families with disabilities, should they become available

: Affirmatively market to local non-profit agencies that assist families with disabilities

: Other: (list below)

- Provide preference to developers seeking Section 8 Project Based Vouchers in developments that provide services for families with disabilities.
- HOPWA in Public Housing

- Supported Housing Programs in Public Housing
- Section 8 Moderate Rehab Supported Housing Programs
- The Boston Cooperative Agreement to Benefit Homeless Individuals (CABHI)
- VASH Program in Section 8
- Chronically Homeless (Preference for long term shelter stayers applies to Section 8 applicants)
- Moving On for the City of Boston
- City of Boston Coordinated Access System Referrals

Need: Specific Family Types: Races or ethnicities with disproportionate housing needs

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:

Select if applicable

: Affirmatively market to races/ethnicities shown to have disproportionate housing needs

: Other: (list below)

As necessary affirmatively market to races/ethnicities shown to have disproportionate needs in the administration of site based waiting lists in the public housing program (see ACOP).

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

: Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units

: Market the section 8 program to owners outside of areas of poverty /minority concentrations

: Other: (list below)

Actively participate with the City of Boston in the development of an Assessment of Fair Housing and implementation of the Consolidated Housing Plan for the City of Boston. In the year ahead, the BHA also plans to affirmatively further fair housing by implementing an Expanding Choice in Housing Opportunities (ECHO) five-year pilot program to assist 100-200 voucher-holders in overcoming barriers to leasing up in neighborhoods of their choice around the metro region.

Other Housing Needs & Strategies: (list needs and strategies below)

(2)Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

: Funding constraints

: Staffing constraints

: Limited availability of sites for assisted housing

: Extent to which particular housing needs are met by other organizations in the community

: Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA

: Influence of the housing market on PHA programs

: Community priorities regarding housing assistance

: Results of consultation with local or state government

: Results of consultation with residents and the Resident Advisory Board

: Results of consultation with advocacy groups

: Other: (list below)

2. Eligibility, Selection and Admissions Policies, including Deconcentration and Wait list Procedures

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete this subcomponent.

(1) Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

___: When families are within a certain number of being offered a unit: (state number)

___: When families are within a certain time of being offered a unit: (state time)

X: Other: (describe) At the time of preliminary application as well as when the applicant nears the top of the wait list. In addition the BHA verifies eligibility for admission for proposed additions to current households' family composition, personal care attendants/live-in aides, and for residual tenancy applicants.

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

X: Criminal or Drug-related activity

X: Rental history

X: Housekeeping which may include home visits when negative housekeeping history is documented

X: Other (describe) behavior towards landlords, neighbors, BHA staff, treatment of property, credit history, utility payment history, and eligible immigration status In addition the BHA will comply with the HUD's Enterprise Income Verification (EIV) reporting for bad debts requirements and checking eviction history when reported through the EIV system.

c. X: Yes ___: No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. X: Yes ___: No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. ___: Yes X: No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC- authorized source) The BHA uses the Dru Sjodin -SORI- and the National Sex Offender Registry. The BHA also obtain criminal records from out of state for applicants who have resided outside of Massachusetts. The BHA obtains out of state criminal records in compliance of each state's criminal check request requirements including Puerto Rico.

(2) Waiting List Organization

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

: Community-wide list

: Sub-jurisdictional lists

: Site-based waiting lists

: Other (describe)

b. Where may interested persons apply for admission to public housing?

: PHA main administrative office

: PHA development site management office (obtain information)

: Other: by mail, if out of state or as a reasonable accommodation

May obtain application information by phone, via e-mail, and by downloading forms from the BHA website (www.bostonhousing.org). Applications may be mailed for those living out of state or as a reasonable accommodation.

c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year? 50 public housing; and 5 HOPE VI and 1 at Franklin Hill and Anne M. Lynch Homes at Old Colony privately operated by the owners.

2. : Yes : No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD- approved site based waiting list plan)?

If yes, how many lists?

3. : Yes : No: May families be on more than one list simultaneously?

If yes, how many lists? All lists for which they meet the threshold eligibility criteria.

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

: PHA main administrative office

: All PHA development management offices (obtain information)

: Management offices at developments with site-based waiting lists

: At the development to which they would like to apply

: Other: Obtain information by visiting the BHA's website (www.bostonhousing.org), by mail, phone, via e-mail and or online through the Common Housing Application for Massachusetts Public Housing (CHAMP) website. HOPE VI and other mixed finance

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redevelopment sites – Mission Main, Orchard Gardens, Orchard Commons, Washington Beech, Maverick Landing, Franklin Hill, and Anne M. Lynch Homes at Old Colony Phase I, II, III, and IV and any other future public housing property converted with mixed finance - maintain and establish their own waiting lists for public housing units. Waiting lists for all Section 8 project-based voucher and Moderate Rehabilitation units, however, are maintained by BHA. In addition, the BHA will maintain the public housing and Section 8 Project-Based waiting lists for Heritage and Lower Mills as well as for any other BHA public housing property converted to Section 8 Project-Based Voucher.

(3) Assignment

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

: One

: Two

: Three or More

b. : Yes : No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

(4) Admissions Preferences

a. Income targeting: : Yes : No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income? However, given the demographics of the public housing wait list it is anticipated that new admissions at or below 30% of median area income will significantly exceed 40%.

b. Transfer policies:

In what circumstances will transfers take precedence over new admissions? (list below)

: Special Circumstances (Every other fourth unit by Bedroom Size by Development will be offered to Special Circumstances Transfers)

: Overhoused: (by 2 or more bedrooms are considered as Administrative Transfers)

: Underhoused: (by 3 or more bedrooms are considered Special Circumstances Transfers)

: Medical justification: (in a life threatening situation)

: Administrative reasons determined by the PHA (e.g., to permit modernization work, address severe over housing, make apartments with special features available to persons with disabilities, address safety needs due to domestic violence related matters, etc.)

: Resident choice: (state circumstances below) Elderly/Disabled living in family housing transfer to elderly/disabled housing; Non-Elderly Disabled residing in Elderly/Disabled Housing

transferring to Family Housing; residents living in studio apartments for two years or longer and in good standing may elect to transfer to 1BR units.

: Other: (list below) under or over housed transfers if site is 98% occupied.

Note: Transfers in checked boxes above take precedence over new admissions in highest priority category as follows: 1) Administrative Transfers will take precedence over Special Circumstances Transfers and all new admissions; 2) Special Circumstances will take precedence over new admissions for every other fourth unit by development by bedroom size; 3) Under or Over housed Transfers will be offered every eighth unit by development by bedroom size if the site is at the 98% occupancy rate.

c. Preferences

1. : Yes : No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If "no" is selected, skip to next subsection Occupancy)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

: Involuntary Displacement (Disaster, Government Action, Action of Housing Owner [No-Fault Court-Ordered Eviction Only], Inaccessibility [Disabled Applicant Only], Property Disposition, Condemnation, Displacement by any low- rent housing project or by public slum clearance or urban renewal project), Victims of reprisals or hate crimes

: Victims of domestic violence

: Substandard housing Homelessness

: High rent burden (rent is > 50 percent of income) (for Elderly/Disabled Program only)

: Imminent Landlord displacement (for Elderly/Disabled housing program only)

Other preferences: (select below)

: Working families and those unable to work because of age or disability

: Veterans and veterans' families

: Residents who live and/or work in the jurisdiction

: Those enrolled currently in educational, training, or upward mobility programs

: Households that contribute to meeting income goals (broad range of incomes)

: Households that contribute to meeting income requirements (targeting)

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: Those previously enrolled in educational, training, or upward mobility programs

: Other preference(s) (list below)

- Disabled head or co-head (family housing program only) if does not require a wheelchair accessible unit.
- Designated Housing Preference (for Elderly/Disabled housing program only) if does not require a wheelchair accessible unit.
- Displaced Resident from a Unit in the City of Boston Preference
- Supported Housing Programs made housing offers before Priority One Applicants.

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time: Only factor among residents/clients with same priority/preference status

Former Federal preferences:

1 Involuntary Displacement (Natural Disaster, Condemnation, Government Action, Action of Housing Owner [No-Fault Court-Ordered Eviction Only], Inaccessibility [Disabled Applicant Only] Displacement by any low-rent housing project or by public slum, victims of reprisals or hate crimes

1 Victims of domestic violence

1 Homelessness

2 High rent burden (Elderly/Disabled program only)

2 Imminent landlord displacement (Elderly/Disabled program only)

Other preferences: (select below)

: Working families and those unable to work because of age or disability

: Veterans and veterans' families

: Residents who live and/or work in the jurisdiction

: Those enrolled currently in educational, training, or upward mobility programs

: Households that contribute to meeting income goals (broad range of incomes)

: Households that contribute to meeting income requirements (targeting)

: Those previously enrolled in educational, training, or upward mobility programs

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X: Other preference(s) (list below)

- Disabled head or co-head (family housing program only) if does not require a wheelchair accessible unit.
- Designated Housing Preference (for Elderly/Disabled housing program only) if does not require a wheelchair accessible unit.
- Displaced Resident from a Unit in the City of Boston Preference
- Supported Housing Programs made housing offers before Priority One Applicants.

4. Relationship of preferences to income targeting requirements:

X: The PHA applies preferences within income tiers: Income tiers are used in our HOPE VI redevelopment sites and at our non-HOPE VI redevelopment sites, including West Broadway and Franklin Hill. Income tiering is in effect only after existing residents in good standing have the opportunity to return to the redeveloped site, regardless of their income.

X: Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Occupancy:

- a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

X: The PHA-resident lease

X: The PHA's Admissions and Continued Occupancy policy

X: PHA briefing seminars or written materials

X: Other source (list): BHA website (www.bostonhousing.org), BHA Reasonable Accommodation Policy, Limited English Proficiency (LEP) Policy, BHA Pet Policies, Transfer Guide, Violence Against Women Act (VAWA) Policy, Rent Manual – available at management offices. For mixed-finance properties may reference the ACOP and/or Administrative Plan available with management.

- b. How often must residents notify the PHA of changes in family composition? (select all that apply)

X: At an annual reexamination and lease renewal

X: Any time family composition changes

X: At family request for revision

___: Other (list)

(6) Deconcentration and Income Mixing:

a. ___: Yes : No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. ___: Yes : No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

___: Adoption of site-based waiting lists

If selected, list targeted developments below:

___: Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments

If selected, list targeted developments below:

___: Employing new admission preferences at targeted developments If selected, list targeted developments below:

___: Other (list policies and developments targeted below)

d. ___: Yes : No: Did the PHA adopt any changes to other policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

___: Additional affirmative marketing

___: Actions to improve the marketability of certain developments

___: Adoption or adjustment of ceiling rents for certain developments

___: Adoption of rent incentives to encourage deconcentration of poverty and income- mixing

___: Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)

: Not applicable: results of analysis did not indicate a need for such efforts

List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

: Not applicable: results of analysis did not indicate a need for such efforts

___: List (any applicable) developments below:

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete this sub-component.

Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

: Criminal or drug-related activity only to the extent required by law or regulation

___: Criminal and drug-related activity, more extensively than required by law or regulation

___: More general screening than criminal and drug-related activity (list factors below)

: Other (list below) eligible immigration status, priority and preference verification

b. : Yes ___: No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c. : Yes ___: No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. ___: Yes : No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC- authorized source) The BHA uses the Dru Sjodin –SORI- and the National Sex Offender Registry. The BHA also obtain criminal records from out of state for applicants who have resided outside of Massachusetts. The BHA obtains out of state criminal records in compliance of each state's criminal check request requirements including Puerto Rico.

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

___: Criminal or drug-related activity

___: Other (describe below)

(2) Waiting List Organization

a. With which of the following program waiting lists is the Section 8 Tenant-Based assistance waiting list merged? (select all that apply)

: None

___: Federal public housing

___: Federal moderate rehabilitation

___: Federal project-based certificate program

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___: Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

: PHA main administrative office Leased Housing Division-Occupancy Department and mail. Application information can be obtained via website (www.bostonhousing.org), phone, and e-mail. The tenant-based waiting list has been closed since October 2008.

: Other: There are several special admissions programs run by the BHA with non-profit partners which allow applications on a referral basis to eligible families.

(3) Search Time

a. : Yes ___: No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below: See Leased Housing Administrative Plan Chapter 7.2 Voucher Term Length, Tolling, Extension, Expiration and Withdrawal

(4) Admissions Preferences

a. Income targeting

___: Yes : No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1. : Yes ___: No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent (5) Special purpose section 8 assistance programs)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

: Involuntary Displacement (Disaster, Government Action, Action of Housing Owner through no fault of your own, Inaccessibility, Property Disposition), victims of reprisals or hate crimes

: Victims of domestic violence

___: Substandard housing

: Homelessness

___: High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

: Working families and those unable to work because of age or disability

: Veterans and veterans' families

___: Residents who live and/or work in your jurisdiction

___: Those enrolled currently in educational, training, or upward mobility programs

___: Households that contribute to meeting income goals (broad range of incomes)

___: Households that contribute to meeting income requirements (targeting)

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___: Those previously enrolled in educational, training, or upward mobility programs

X: Other preference(s) (list below)

1. Project-Based Voucher Residents who have completed 1 Year residency and are in good standing may opt for a tenant-based voucher when available.
2. Condemnation
3. Transfer from BHA public housing or Section 8 Moderate Rehabilitation Program or Project-Based Voucher programs because of health, safety, BHA rehabilitation programs, reasonable accommodation, and humanitarian reasons
4. One or two-persons both elderly, disabled or displaced families (including persons who are displaced as a result of expiring use) over other singles.
5. A participant in a supportive housing program for elderly or disabled persons shall be considered to be imminently in danger of homelessness and shall be eligible for Priority One status if the program participant: 1) has been a tenant in such program for not less than twelve (12) months; AND 2) has outgrown or completed the program's services; AND 3) as a result must relocate from such housing.
6. Displaced Former Boston Resident.
7. Applicants referred by Boston Public Health Commission for participation in the Boston Cooperative Agreement to Benefit Homeless Individuals (CABHI)
8. Applicants referred by Massachusetts Department of Housing and Community Development for Leading the Way Home Program.
9. Priority one non-elderly disabled applicants who, in accordance with the BHA's Designated Housing Plan would have otherwise been called in for screening for a BHA public housing unit will be referred to Leased Housing.
10. Applicants referred by the City of Boston who currently occupy transitional housing with supportive services and are no longer in need of such services.
11. Applicants referred by HomeStart for the Rapid Rehousing program.
12. Applicants referred by the City of Boston for the Coordinated Access System.
13. PBV participants who are displaced through no fault of their own.
14. Former residents returning to a new construction PBV site that was identified as replacement housing.

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time: (Only a factor among residents with same priority status)

Former Federal preferences

- 1 Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition), victims of reprisals or hate crimes
- 1 Victims of domestic violence

Other preferences (select all that apply)

X: Working families and those unable to work because of age or disability

X: Veterans and veterans' families

___: Residents who live and/or work in your jurisdiction

___: Those enrolled currently in educational, training, or upward mobility programs

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- ___: Households that contribute to meeting income goals (broad range of incomes)
- ___: Households that contribute to meeting income requirements (targeting)
- ___: Those previously enrolled in educational, training, or upward mobility programs
- X: Other preference(s) (list below)

Priority	Category
PBV	Project-Based Voucher Residents who have completed 1 Year residency and are in good standing may opt for a tenant-based voucher when
Special Purpose Vouchers	Special Purpose Vouchers: The BHA will admit an Applicant who qualifies for a particular category of Special Purpose Vouchers to the Section 8 program before all other Applicants on the waiting list if the BHA is not currently assisting the required number of special purpose vouchers families
Super	Transfer from BHA public housing, Section 8 Moderate Rehabilitation Program or Project- Based Voucher programs because of health, safety, BHA rehabilitation programs, reasonable accommodation, and humanitarian reasons*
1	Condemnation
1	Homeless families and individuals residing in shelters
1	A participant in a supportive housing program for elderly or disabled persons shall be considered to be imminently in danger of homelessness and shall be eligible for Priority One status if the program participant: 1) has been a tenant in such program for not less than twelve (12) months; AND 2) has outgrown or completed the program's services; AND 3) as a result must relocate from such housing.
Preference Points	One or two-person elderly, disabled or displaced families (including persons who are displaced as a result of expiring use) over other singles.
Preference Points	Preference Under Olmstead The BHA has an admissions preference for those qualified individuals with mental and/or physical disabilities exiting institutions or who are at serious risk of institutionalization. Applicants who receive this preference must be willing to participate in services as provided by State Money Follows the Person (MFP) entities or other support service agencies and partnering organizations. The
Preference Points	Homeless Service Organizations Preference The BHA has an admissions preference for those applicants who are referred by a partnering homeless service organization or consortia of homeless service organizations. This preference will be applied to specific site based lists where supported housing services are offered by said organization.
Preference Points	Displaced Resident from a unit in the City of Boston Preference
Preference Points	Right of first refusal
Preference Points	Long term homelessness
Preference Points	No fault displacement

*The Section 8 Tenant-Based Voucher waiting list is closed except for current BHA Project Based Housing Choice Voucher participants who meet the eligibility requirements as established in the Administrative Plan and are ranked above all other Section 8 Tenant-Based Housing Choice waiting list applicants, current BHA Residents who are determined to qualify for Super priority and priority one non-elderly disabled public housing applicants who in accordance with the BHA's Designated Housing Plan would have otherwise been called in for screening for a BHA public housing unit. Referrals will be accepted from City of Boston Interagency Council on Housing and Ending Homelessness Programs, and Leading the Way Home as funding permits.

The following chart further demonstrates the BHA's priority/preference categories and how they are ranked:

Section 8 Admissions Point System

(a) The **Priority point system** used by BHA to process new Admissions on all waiting lists is as follows:

PBV w/ 1 Year residency	95 points
Super Priority Applicants	75 points
Mitigation Vouchers	60 points
City of Boston ICHH Programs Priority	50 points
Priority One Applicants	30 points
Standard Applicants	0 points

(b) **Preference points** will be added to Priority points as follows for Applicants for Admission only:

1. Project Based Voucher Elderly	100 Points
2. Right of First Refusal	25 Points
3. No Fault Displacement	20 Points
4. Preference under Olmstead	7 Points
5. Homeless Service Organizations	7 Points
6. Long Term Homelessness	7 Points
7. Single Elderly or Disabled	5 Points
8. Veterans Preference	3 points
9. Displaced Boston Resident Preference	2 points
10. Working Families, Single Disabled, Single Elderly Preference	1 points

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)

: Date and time of application (after lottery for Housing Choice Voucher Program tenant-based)

: Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)

: This preference has previously been reviewed and approved by HUD for Displaced Resident from a unit in the City of Boston

: The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)

: The PHA applies preferences within income tiers

: Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Special Purpose Section 8 Assistance Programs

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)

: The Section 8 Administrative Plan

: Briefing sessions and written materials

: Other: Section 8 Moderate Rehabilitation Administrative Plan, Reasonable Accommodation Policy, BHA Limited English Proficiency Policy, Individual program mailings (i.e. Family Self-Sufficiency (FSS) program marketing), advocacy group meetings, support service groups, www.bostonhousing.org

b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?

: Through published notices

: Other: Press releases and Marketing to targeted support service groups

3. Financial Resources

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants		
1a. Public Housing Operating Fund	\$62,137,314	
1b. Public Housing Capital Fund	\$27,553,690	
1c. HOPE VI Revitalization	-----	
1d. HOPE VI Demolition	-----	
1e. Annual Contributions for Section 8 Tenant-Based Assistance	\$218,104,186	
1f. Public Housing Drug Elimination Program (including any Technical Assistance funds)	-----	
1g. Resident Opportunity/Self-Sufficiency Grants	-----	
1h. Community Development Block Grant	-----	
1i. HOME	-----	-----
1j. Project Based Section 8	\$7,510,608	-----
2. Prior Year Federal Grants (unobligated funds only)		
2a. CGP/DDTF	\$12,862,443	
2b. HOPE VI		
3. Public Housing Dwelling Rental Income	\$37,130,000	Operating
4. Other income, Vending /Laundry, Cell Towers, Insurance settlements, Tenant Damages	\$800,000	Operating, Social Services
4a. Investment income	\$10,000	Operating
4b. Non-dwelling rent	\$12,000	Operating
5. Non-federal sources (list below)		
Donations	\$20,000	Social Services
Total resources	\$366,140,241	

4. Rent Determination

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete this sub-component.

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

: The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

: The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

: \$0

: \$1-\$25

: \$26-\$50

2. : Yes : No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below:

c. Rents set at less than 30% than adjusted income

1. : Yes : No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusions policies

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does the PHA plan to employ (select all that apply)

: For the earned income of a previously unemployed household member

: For increases in earned income (between annual recertifications)

: Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

: Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

: For household heads

: For other family members

: For transportation expenses

: For the non-reimbursed medical expenses of non-disabled or non-elderly families

: Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

: Yes for all developments

: Yes but only for some developments

: No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

: For all developments (includes family and elderly/disabled developments; excludes HOPE VI and redeveloped properties)

: For all general occupancy developments (not elderly or disabled or elderly only)

: For specified general occupancy developments

: For certain parts of developments; e.g., the high-rise portion

: For certain size units; e.g., larger bedroom sizes

: Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

: Market comparability study

: Fair market rents (FMR)

: 95th percentile rents

- : 75 percent of operating costs
- : 100 percent of operating costs for general occupancy (family) developments
- : Operating costs plus debt service
- : The "rental value" of the unit
- : Other (list below) Set at Flat Rent levels for each bedroom size (80% of Fair Market Rent)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)
 - : Never
 - : At family option (if income decreases)
 - : Any time the family experiences an income increase
 - : Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) \$200/month
 - : Other (list below)

g. : Yes : No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)
 - : The section 8 rent reasonableness study of comparable housing
 - : Survey of rents listed in local newspaper
 - : Survey of similar unassisted units in the neighborhood
 - : Other (list/describe below) HOPE VI sites set their own flat rents. For updated flat rent information, contact the respective management offices.

The Boston Housing Authority will set the flat rental amount for each public housing unit that complies with the requirement that all flat rents be set at no less than 80 percent of the applicable Fair Market Rent (FMR) adjusted, if necessary, to account for reasonable utilities costs. For current program participants that pay the flat rental amount, the new flat rental amount will be offered, as well as the income-based rental amount, at the next annual rental option.

The Boston Housing Authority will place a cap on any increase in a family's

rental payment that exceeds 35 percent, and is a result of changes to the flat rental amount as follows:

- Multiply the existing flat rental payment by 1.35 and compare that to the updated flat rental amount;
- The BHA will present two rent options to the family as follows:
 - the lower of the product of the calculation and the updated flat rental amount; and
 - the income-based rent.

The Flat rent amount by bedroom size will be reviewed yearly each October and any necessary changes will become effective by 1st of January. The BHA will maintain a current listing of its flat rent schedule as an appendix to the BHA Rent Manual and will provide this list to residents at least annually as part of the TSR process.

A. Financial Hardship: Residents who choose flat rents may request to change to an income-based rent at any time if the family is unable to pay the flat rent because of financial hardship. A financial hardship exists for these purposes when a family's income is reduced or their deductions are increased to the extent that an income-based rent is lower than the flat rent.

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete this sub-component. Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Payment Standards

Describe the voucher payment standards and policies.

a. What is the PHA's payment standard? (select the category that best describes your standard)

___: At or above 90% but below 100% of FMR

___: 100% of FMR

X: Above 100% but at or below 110% of FMR

___: Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

___: FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area

: The PHA has chosen to serve additional families by lowering the payment standard

: Reflects market or submarket

: Other (list below) – Not Applicable

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

: FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area

: Reflects market or submarket

: To increase housing options for families

: Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

: Annually

: Other (list below) As needed, but at minimum annually.

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

: Success rates of assisted families

: Rent burdens of assisted families

: Other (list below) Market Conditions

(2) Minimum Rent

a. What amount best reflects the PHA's minimum rent? (select one)

: \$0

: \$1-\$25

: \$26-\$50

b. : Yes : No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

5. Operations and Management

Exemptions from this Component: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2).

A. PHA Management Structure

Describe the PHA's management structure and organization. (select one)

: An organization chart showing the PHA's management structure and organization is on page 118.

: A brief description of the management structure and organization of the PHA follows:

DEVELOPMENT NAME	ADDRESS	BHA MANAGED	PRIVATELY MANAGED
Alice H. Taylor	71 Prentiss Street, Roxbury, MA 02120	X	
Annapolis	52 Summer Street, Dorchester, MA 02122	X	
Ashmont	374 Ashmont Street, Dorchester, MA 02124	X	
Ausonia	185 Fulton Street, Boston, MA 02109	X	
Barkley (Cathedral)	1472 Washington Street, Boston, MA 02118	X	
Bellflower	24 Bellflower Street, Dorchester, MA 02125	X	
Bunte (Walnut Park)	1990 Columbus Avenue, Roxbury, MA 02119	X	
Charlestown	55 Bunker Hill Avenue, Charlestown, MA 02129	X	
Codman	784 Washington Street, Dorchester, MA 02124	X	
Commonwealth	35 Fidelis Way, Brighton, MA 02135		X
Davison	101 Davison Street, Hyde Park, MA 02136	X	
Eva White	440 Tremont Street, Boston, MA 02116		X
Foley	199 "H" Street, South Boston, MA 02127	X	
Franklin Field	91 Ames Street, Dorchester, MA 02124	X	
Franklin Hill Aptmts.	113 Shandon Road, Dorchester, MA 02124		X
Frederick Douglass	755 Tremont Street, Roxbury, MA 02118	X	
General Warren	47 Washington St #26, Charlestown, MA 02129		X
Groveland	15 Mary Moore Beatty Circle, Mattapan, MA 02126	X	
Hailey (Bromley Park)	42 Horan Way, Jamaica Plain, MA 02130	X	
Hampton House	155 Northampton Street, Roxbury, MA 02118	X	
Hassan	705 River Street, Mattapan, MA 02126	X	
Hailey (Heath Street)	42 Horan Way, Jamaica Plain, MA 02130	X	
Heritage	209 Sumner Street, East Boston, MA 02128		X
Highland Park	16 Center Street, Roxbury, MA 02119		X
Holgate	125 Elm Hill Avenue, Roxbury, MA 02121	X	

DEVELOPMENT NAME	ADDRESS	BHA MANAGED	PRIVATELY MANAGED
J.J. Carroll	130 Chestnut Hill Street, Brighton, MA 02135		X
Lenox Street	136 Lenox Street, Roxbury, MA 02118	X	
Lower Mills	2262 Dorchester Avenue, Dorchester, MA 02124	X	
Malone	11 Gordon Avenue, Hyde Park, MA 02136	X	
Mary Ellen McCormack	354 Old Colony Avenue, South Boston, MA 02127	X	
Maverick Landing	42 Border Street, East Boston, MA 02128		X
Meade	5 Melville Avenue, Dorchester, MA 02124	X	
Martin Luther King Tower	280 Martin Luther King Boulevard, Roxbury, MA 02119	X	
Mission Main	43 Smith Street, Roxbury, MA 02120		X
Anne M. Lynch Homes at	255 East Ninth Street, South Boston, MA 02127	X	
Anne M. Lynch Homes at Old Colony Phase 1, 2A, 2B, and 2C	25 James O'Neill Street, South Boston, MA 02127		X
Orchard Commons	2315 Washington Street, Roxbury, MA 02119		X
Orchard Gardens	25 Ambrose Street, Roxbury, MA 02119		X
Pasciucco	330 Bowdoin Street, Dorchester, MA 02122	X	
Patricia White	20 Washington Street, Brighton, MA 02135		X
Peabody/Englewood	1875 Dorchester Avenue, Dorchester, MA 02122	X	
Pond Street	29 Pond Street, Jamaica Plain, MA 02130	X	
Rockland	5300 Washington St., West Roxbury, MA 02132	X	
Roslyn	1 Cliffmont Street, Roslindale, MA 02132	X	
St. Botolph	70 St. Botolph Street, Boston, MA 02116	X	
Spring Street	23 Spring Street, West Roxbury, MA 02132	X	
Torre Unidad	80 West Dedham Street, Roxbury, MA 02119	X	
Washington/Beech	4550 Washington Street, Roslindale, MA 02130		X
Washington Manor	1701 Washington Street, Roxbury, MA 02118	X	
Washington Street	35 Fidelis Way, Brighton, MA 02135		X
West Ninth Street	195 W. 9 th Street, South Boston, MA 02127	X	
Whittier Street	1170 Tremont Street, Roxbury, MA 02120	X	

Note: Sample contracts with management companies have been included with the Agency Plan supporting documents available in the Planning Department. In addition, the management assessment form used to evaluate performance at each site for both private management companies and in-house managers is available. Resident input in the evaluation of private management companies is considered

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through 1-2 private meetings with the resident organizations during the term of the contracts and prior to selection of contractors during contract renewal processes. Regular interaction between Local Tenant Organizations and BHA supervisory staff informs and guides in assessing management performance at sites directly managed by the BHA.

B. HUD Programs Under PHA Management (as of April 1, 2018)

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use “NA” to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	8404*	470
Section 8 Vouchers	14,558**	720
Section 8 Certificates	0	
Section 8 Project Based voucher Program	1541	90
Section 8 Mod Rehab	593	0
Section 8 New Construction / Substantial Rehab Program	0	0
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Veterans Administration Supportive Housing (VASH)	605	65
Mainstream Housing Program	399	25
Designated Housing Program vouchers for non-elderly disabled currently on BHA's Elderly/Disabled Public Housing Program waiting list	200	6
Family Unification Program	138	9
NAACP	342	9

Public Housing Drug Elimination Program (PHDEP)	N/A	N/A
Other Federal Programs(list individually)		N/A
Elderly and Disabled Resident Services Program	3394	298
Supportive Housing Services Program	72	15
Section 8 Family Self-Sufficiency Program	123***	0
Resident Employment Program	9****	N/A
Public Housing Family Self-Sufficiency	50	N/A
Resident Services Program (ROSS funded)	400	N/A
Jobs Plus Pilot Program	390	N/A

* total federal development only anticipated occupancy on 4/1/2019.

**This figure includes all HCVP, PBV, and VASH units and is a unit baseline for the program. The actual number of units we are able to lease is restricted by annual budget authority.

***Currently enrolling new FSS participants.

****Section 3 is a provision of the Housing and Urban Development (HUD) Act of 1968 that helps foster local economic development, neighborhood economic improvement, and individual self-sufficiency. The Section 3 program requires that recipients of certain HUD financial assistance, to the greatest extent feasible, provide job training, employment, and contracting opportunities for low- or very-low income residents in connection with projects and activities in their neighborhoods. Section 3 residents are:

- Public housing residents or
- Persons who live in the area where a HUD-assisted project is located and who have a household income that falls below HUD's income limits.

-NA- These programs provide assistance to all eligible applicants so turnover rates are not applicable.

C. Management and Maintenance Policies

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation

(which includes cockroach infestation) and the policies governing Section 8 management.

(1) Agency-wide policies (govern both Public Housing and Section 8): (list below)

- Cash Management and Investment Policy
- Civil Rights Protection Plan
- Confidentiality & Confidentiality Agreement Policy
- Drug Free Workplace Policy
- EIV Security Manual
- Healthy Beverage Policy (aka Sugar-Sweetened Beverage Policy)
- Limited English Proficiency Policy
- Minority Participation Policy
- Procurement Policy
- Reasonable Accommodation Policy
- Resident Employment Provision
- Section 3 Policy
- Sexual Harassment Policy
- Social Media Participation Policy
- Storm Policy for Staff Attendance
- Sustainability Plan
- Technology Resources Usage Policy (E-mail)
- Tobacco Free Workplace Policy
- Video Surveillance System Policy
- Violence Against Women Act Policy

(1) Public Housing Maintenance and Management:

- (Site-Based) Admissions and Continued Occupancy Policy (ACOP)
- Community Service Policy
- Community Space Use Policy
- Deconcentration Policy
- Demolition/Disposition Policy
- Designated Housing Plan
- Non-Smoking Policy
- Pest Control Policy
- Pet Policy for the Elderly/Disabled Program
- Pet Policy for the Family Program
- Rent Manual
- Resident Relocation and Rehousing Policy
- Site Based Purchasing System Policy
- Standard Operating Procedures for Maintenance
- Tenant Grievance Procedures
- Tenant Participation (LTO) Policy

(2) Section 8 Management: (list below)

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- Section 8 Administrative Plan
- Section 8 Moderate Rehabilitation Administrative Plan

6. Grievance Procedure

Exemptions from this component: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

A. Public Housing

1. : Yes : No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

Residents seeking a grievance hearing are afforded the option of electing to have a hearing before a Grievance Hearing Panel or a Hearing Officer.

Decisions of the Grievance Panel or a Hearing Officer (except those relating to an eviction) may be appealed to a designee of the Administrator.

In addition, Grievance Procedures are developed for each redevelopment site that transition to private ownership. The BHA worked with residents and owners from these sites and created a consistent, universal Mixed Finance Site Grievance Procedure.

Also see Section 19 of the Plan Supplement: Conversion of Public Housing to Project-Based Assistance under RAD for further information on Resident Rights, Participation, Waiting List and Grievance Procedures.

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

: PHA main administrative office

BHA Department of Grievances and Appeals Hearing Panel Coordinator
52 Chauncy Street, 9th Floor (617) 988-4579

: PHA development management offices

: Other (list below): For sites owned and managed by private companies (the "Mixed Finance" sites), management offices at those sites.

B. Section 8 Tenant-Based Assistance

1. : Yes : No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below: Please refer to Section 8

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Administrative Plan.

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

: PHA main administrative office

BHA Department of Grievances and Appeals 52 Chauncy Street, 9th Floors
(617) 988-4579

: Other (list below)

7. Homeownership Programs

A. Public Housing

1. ___: Yes : No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If "No", skip to next component; if "yes", complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to small PHA or high performing PHA status. PHAs completing streamlined submissions may skip to next component.)

2. Activity Description

___: Yes ___: No: Has the PHA provided all required activity description information for this component in the optional Public Housing Asset Management Table? (If "yes", skip to next component. If "No", complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)

1a. Development name:

1b. Development (project) number:

2. Federal Program authority:

___: HOPE I

___: 5(h)

___: Turnkey III

___: Section 32 of the USHA of 1937 (effective 10/1/99)

3. Application status: (select one)

___: Approved; included in the PHA's Homeownership Plan/Program

___: Submitted, pending approval

___: Planned application

4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)

5. Number of units affected:

6. Coverage of action: (select one)

___: Part of the development

___: Total development

B. Section 8 Tenant Based Assistance

1. X : Yes ___: No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982? (If “No”, skip to next component; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. High performing PHAs may skip to next component.)

2. Program Description: In accordance with the regulations promulgated by the Secretary of the United States Department of Housing and Urban Development, the Boston Housing Authority has implemented a Housing Choice Voucher Homeownership program. The mission of the Authority is to provide homeownership possibilities, self-sufficiency training and support, and facilitate community growth, while providing parameters which will attempt to minimize defaults which consequently have a negative impact on both the family and the community.

The Leased Housing Department has partnered with the City of Boston’s Department of Neighborhood Development. DND has an established First Time Home Buyers program. By partnering with our sister agency, the Leased Housing Division has dramatically expedited the implementation of this program. The partnership has strengthened and effectively broadened the impact of homeownership opportunities within the City by providing services, support and expertise in a myriad of areas.

ELIGIBILITY ISSUES

The homeownership option has and will continue to be offered to families participating in the Housing Choice Voucher Program and the Family Self-Sufficiency Program (FSS). A successful graduate of the FSS Program may also be eligible for homeownership.

APPLICATION PROCESS

Families applying or participating in the Housing Choice Voucher Program who indicate homeownership interest will have their eligibility determined by the Leased Housing Department’s Section 8 personnel. At the same time, the family will be referred to a HUD approved housing counseling agency, primarily to DND’s First Time Home Buyers Program or a similarly qualified agency, for the purpose of learning about the various responsibilities of owning a home. The topics may include, but not be limited to the following: home maintenance, budgeting and money management, credit counseling, financing, homeownership opportunities, fair housing lending and real estate settlement procedures. If necessary, the Authority may offer additional homeownership counseling to participants and has discretion to require the family to participate in ongoing counseling.

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a. Size of Program

___: Yes : No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- ___: 25 or fewer participants
___: 26 - 50 participants
___: 51 to 100 participants
___: more than 100 participants

b. PHA-established eligibility criteria

: Yes ___: No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

To be eligible to participate in the BHA's Section 8 Homeownership Program the family must:

- Must be a Section 8 participant in good standing in the BHA's Section 8 program.
- Must be a Family Self Sufficiency program participant (or graduate) and have remained a participant in good standing with respect to the contractual goals and requirements of the family's FSS Individual Training and Service Plan.
- Meet all eligibility criteria as described in the Section 8 Homeowner Administrative Plan.
- Attend homeownership counseling prior to purchase and post-purchase as offered by BHA-approved counseling agencies.
- Secure financing through a lender acceptable to the BHA.
- Be able to make the monthly payment of the family's portion of the mortgage payment.
- Sign a release allowing the BHA to exchange information with the lender and the lender with the BHA.
- Provide a down payment of at least three percent (3%) of the purchase price.
- Enter into a "Purchase and Sale Agreement" for a home within 180 days of receiving a homeownership voucher, provided the financing commitment has not expired prior to that date.

- Sign an acknowledgment form that the family becomes obligated for the whole mortgage payment in the event of termination of assistance.
- Agree that the family may not enter into an agreement to sell or refinance the home unless the BHA has first approved the sale or the refinance.
- Sign an acknowledgment form that the family will continue to comply with the appropriate provisions of the HUD Section 8 Rental Assistance regulations, family obligations and the BHA's Section 8 rental assistance and homeownership administrative plans.
- Agree to maintain the condition of the home so as to comply with HUD Housing Quality Standards (HQS) (although the BHA will not inspect the home annually for HQS compliance).

8. Community Service and Self-Sufficiency

Exemptions from this Component: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

: Yes : No: Has the PHA has entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/YY

2. Other coordination efforts between the PHA and TANF agency (select all that apply)

: Client referrals

: Information sharing regarding mutual clients (for rent determinations and otherwise)

: Coordinate the provision of specific social and self-sufficiency services and programs to eligible families

: Jointly administer programs

: Partner to administer a HUD Welfare-to-Work voucher program

: Joint administration of other demonstration program

: Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

: Public housing rent determination policies

: Public housing admissions policies

: Section 8 admissions policies

: Preference in admission to section 8 for certain public housing families

: Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA

: Preference/eligibility for public housing homeownership option participation

: Preference/eligibility for section 8 homeownership option participation

: Other policies (list below)

b. Economic and Social self-sufficiency programs

: Yes : No: Does the PHA coordinate, promote or provide any programs

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to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Elderly and Disabled Resident Services Program	3394	Open to all residents	Development Office; case manager's office	Public Housing
NAACP	400	Specific criteria	PHA Main Office	Section 8
Veterans Administration Supportive Housing	605	Specific criteria	VA Medical Center in Boston	Section 8
Section 8 Family Self-Sufficiency Program*	123	Open to Section 8 participants	PHA Main Office	Section 8
Leading the Way Home	1536	Specific Criteria	DHCD in Boston	Section 8
HOPWA	15	Specific Criteria	AIDS Action Committee	Public Housing
HomeBase Program	200	Specific Criteria	MBHP in Boston	Public Housing
Healthy Start in Housing	75	Specific Criteria	BPHC in Boston	Public Housing
Health Starts at Home	50	Specific Criteria	Boston Medical Center	Public Housing
BPS Homeless Students	35	Specific Criteria	DND in Boston, Mayor's Office, Boston Public Schools, HigherGround, Project Hope	Public Housing
SAMHSA	270	Specific Criteria	Boston Public Health Commission, Pine Street Inn, Mayor's Office City of Boston, DND	Public Housing and Section 8

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Chronically Homeless Elders	100	Specific Criteria	DND in Boston	Public Housing
Elders Living at Home - ELAPH	40	Specific Criteria	Boston Medical Center	Public Housing
PACE	12	Specific Criteria	Uphams Corner	Public Housing
JRI	20	Specific Criteria	Justice Resource Institute	Public Housing
Public Housing Family Self-Sufficiency Program* & **	50	Specific Criteria	Development Offices, PHA Main Office, Amory St. CSD office	Public Housing
Resident Services Program (ROSS Program)**	500	Specific Criteria	Alice Taylor, Barkley (Cathedral), Charlestown, Franklin Field, Hailey (Bromley Heath) & W. Newton Developments primarily	Public Housing
Jobs Plus Pilot Program**	390	Specific Criteria	Charlestown Development	Public Housing
Resident Employment Program***	97	Specific criteria	PHA Main Office Development Offices	Public Housing

*With the 2014 Notice of Fund Availability, HUD combined the 2 FSS Programs – (Public Housing and Leased Housing) into one Program; however the funding streams remain separate for the Escrow Accounts for Leased Housing and Public Housing participants.

**estimated current size Oct 2018

***Section 3 is a provision of the Housing and Urban Development (HUD) Act of 1968 that helps foster local economic development, neighborhood economic improvement, and individual self-sufficiency. The Section 3 program requires that recipients of certain HUD financial assistance, to the greatest extent feasible, provide job training, employment, and contracting opportunities for low- or very-low income residents in connection with projects and activities in their neighborhoods. Section 3 residents are:

- Public housing residents or
- Persons who live in the area where a HUD-assisted project is located and who have a household income that falls below HUD's income limits.

2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2013)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing	50	50 as of 10/01/18
Section 8	0	Approximately 123 as of 10/01/18*

*could reach 150 over next fiscal year as people are pulled in from the waiting list

b. : Yes ___: No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?

If no, list steps the PHA will take below:

*Not Applicable for Section 8. Minimum program requirements fulfilled.

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

: Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies

: Informing residents of new policy on admission and reexamination

___: Actively notifying residents of new policy at times in addition to admission and reexamination. Post changes / 45 day notice

___: Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services

___: Establishing a protocol for exchange of information with all appropriate TANF agencies

___: Other: (list below)

D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937

Boston Housing Authority

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PUBLIC HOUSING COMMUNITY SERVICE REQUIREMENTS

In compliance with the Quality Housing and Work Responsibility Act of 1998, the Boston Housing Authority has developed a policy to administer the resident community service requirement. This policy describes the community service requirement and includes the following provisions:

- Definitions of community service and economic self-sufficiency
- How residents will be notified
- Definitions of exemptions from participation
- How the exemptions will be verified, both at the beginning of the program and as an ongoing part of program administration
- How compliance will be determined
- How non-compliance will be treated
- BHA's cooperation with other organizations.

BHA's residential lease includes the community service requirement and a community service policy has been approved as part of the ACOP.

Residents became subject to the requirement on October 31, 2003.

Each year at the time of their annual recertification resident compliance with the community service requirement will be determined and exemption status will be re-verified. Residents will be notified of this at least 90 days before the recertification date and required documentation will be specified in the notice. If a resident does not complete community service as required he or she will have one additional year to make up the required service. If the non-compliant resident does not do so or leave the unit, lease termination proceedings will commence.

The policy includes a description of qualifying work and self-sufficiency activities. These activities include but are not limited to: unsubsidized employment, subsidized private or public sector employment, on the job training, job search and job readiness assistance, vocational educational training, job skills training, education directly related to employment, attendance at a secondary school or GED program or provision of child care services to an individual participating in a community service program.

9. Safety and Crime Prevention

Exemptions from this Component: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to the next component. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

A. Need for measures to ensure the safety of public housing residents

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

: High incidence of violent and/or drug-related crime in some or all of the PHA's developments

: High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments

: Residents fearful for their safety and/or the safety of their children

: Observed lower-level crime, vandalism and/or graffiti

: People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime

: Other: Incidence of alleged civil rights violations.

2. What information or data did the PHA use to determine the need for PHA actions to improve safety of residents (select all that apply).

: Safety and security survey of residents

: Analysis of crime statistics over time for crimes committed "in and around" public housing authority

: Analysis of cost trends over time for repair of vandalism and removal of graffiti

: Resident reports

: PHA employee reports

: Police reports

: Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs

: Other: Regular consultation with Tenant Task Forces

Review of Civil Rights Administrative Report Forms

Consultation with Boston Police Department Community Disorders Unit

3. Which developments are most affected? (list below) Family and Elderly/Disabled Developments

B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year

1. List the crime prevention activities the PHA has undertaken or plans to undertake:

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(select all that apply)

: Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities

: Crime Prevention Through Environmental Design

: Activities targeted to at-risk youth, adults, or seniors

: Crime Watch

: Other (describe below)

1. Utilization of video surveillance equipment in select developments including dissemination to other Law Enforcement Agencies aiding in judicial proceedings
2. Regular Crime Prevention Education
3. Key security systems
4. Lease enforcement activity
5. Employment of police force
6. Training program and new uniforms for Safety Officers
7. Bicycle patrol
8. Directed patrols / code 19s to address drug issues and violent crimes in high risk areas including follow up "action teams" to address quality of life issues cited in Special Circumstances Transfer applications.

2. Which developments are most affected? (list below) All developments

C. Coordination between PHA and the police

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

: Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan [BHA Police remain committed to this coordination effort despite the loss of the HUD DEP Grant.]

: Police provide crime data to housing authority staff for analysis and action

: Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)

: Police regularly testify in and otherwise support eviction cases

: Police regularly meet with the PHA management and residents

: Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services

: Other activities: Multi-law enforcement task force partnerships geared towards addressing violent crime, youth and gang violence in identified "Hot spots" and drug interdiction.

2. Which developments are most affected? (list below) All developments [including – Hailey (Bromley Heath), Charlestown, Mission Main, Alice Taylor, Franklin Field, Lenox Camden, Mary Ellen McCormack, and Barkley Apartments (Cathedral).]

D. Additional information as required by PHDEP/PHDEP Plan

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PHAs eligible for FY 2005 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

: Yes : No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?

: Yes : No: Has the PHA included the PHDEP Plan for FY 2005 in this PHA Plan?

: Yes : No: This PHDEP Plan is an Attachment. (Attachment Filename:)

BOSTON HOUSING AUTHORITY VIOLENCE AGAINST WOMEN ACT (VAWA) POLICY

I. Purpose and Applicability

Notwithstanding its title, this policy is gender-neutral, and its protections are available to males who are victims of domestic violence, dating violence, or stalking as well as female victims of such violence.

The purpose of this policy (herein called "Policy") is to implement the applicable provisions of the Violence Against Women and Department of Justice Reauthorization Act of 2013 (Pub. L. 113-4) and more generally to set forth BHA's policies and procedures regarding domestic violence, dating violence, sexual assault and stalking, as hereinafter defined.

This Policy shall be applicable to the administration by BHA of all its federally subsidized public housing and Section 8 rental assistance programs under the United States Housing Act of 1937 (42 U.S.C. §1437 et seq.).

II. Goals and Objectives

This Policy has the following principal goals and objectives:

A. Maintaining compliance, including training of appropriate staff managing BHA properties, with all applicable legal requirements imposed by VAWA;

B. Participating, with others, in protecting the physical safety of victims of actual or threatened domestic violence, dating violence, sexual assault or stalking who are assisted by BHA;

C. Providing and maintaining housing opportunities for victims of domestic violence,

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dating violence, sexual assault or stalking;

D. Cooperating, with others, in formation and maintenance of collaborative arrangements between BHA, law enforcement authorities, victim service providers, and others to promote the safety and well-being of victims of actual and threatened domestic violence, dating violence sexual assault and stalking, who are assisted by BHA; and

E. Responding in accordance with BHA policies and procedures to incidents of domestic violence, dating violence, sexual assault or stalking, affecting individuals assisted by BHA.

III. Other BHA Policies and Procedures

This Policy shall be referenced in and attached to BHA's Five-Year Public Housing Agency Plan and, where appropriate, provisions consistent with this Policy shall be incorporated in and made a part of BHA's Admissions and Continued Occupancy Policy (ACOP), BHA's Section 8 Administrative Plan (Admin Plan), and other BHA policies. BHA's annual public housing agency plan shall also contain information concerning BHA's activities, services or programs relating to domestic violence, dating violence, sexual assault and stalking.

To the extent any provision of this policy shall contradict any previously adopted policy or procedure of BHA, the provisions of this Policy shall prevail.

IV. Definitions

As used in this Policy:

A. Domestic Violence – The term 'domestic violence' includes felony or misdemeanor crimes of violence committed by a current or former spouse of the victim, by a person with whom the victim shares a child in common, by a person who is cohabiting with or has cohabited with the victim as a spouse, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction."

B. Dating Violence – means violence committed by a person—

(A) who is or has been in a social relationship of a romantic or intimate nature with the victim; and

(B) where the existence of such a relationship shall be determined based on a consideration of the following factors:

(i) The length of the relationship.

(ii) The type of relationship.

(iii) The frequency of interaction between the persons involved in the relationship.

C. Stalking – means –

(A) (i) to follow, pursue, or repeatedly commit acts with the intent to kill, injure, harass, or intimidate another person; and (ii) to place under surveillance with the intent to kill, injure, harass or intimidate another person; and

(B) in the course of, or as a result of, such following, pursuit, surveillance or repeatedly committed acts, to place a person in reasonable fear of the death of, or serious bodily injury to, or to cause substantial emotional harm to –

(i) that person;

(ii) a member of the immediate family of that person; or

(iii) the spouse or intimate partner of that person;

D. Sexual assault – means, any nonconsensual sexual act proscribed by Federal, tribal, or State law, including when the victim lacks capacity to consent;

E. Affiliated individual - means, with respect to a person –

(A) a spouse, parent, brother, sister, or child of that person, or an individual to whom that person stands in loco parentis; or

(B) any person, tenant, or lawful occupant living in the household of that person .

F. Perpetrator – means person who commits an act of domestic violence, dating violence, sexual assault or stalking against a victim.

V. Admissions and Screening

A. Denial of Assistance. BHA will not deny admission to public housing or to the Section 8 rental assistance program to any person because that person is or has been a victim of domestic violence, dating violence, sexual assault or stalking, provided that such person is otherwise qualified for such admission.

B. Admissions Preference. Applicants for Public Housing and Section 8 housing assistance from BHA will receive a priority in admission by virtue of their status as victims of domestic violence. This priority is described for Public Housing in the BHA's ACOP and for Section 8 in its Admin Plan.

C. Mitigation of Disqualifying Information. When requested by an applicant for assistance whose history includes incidents in which the applicant was a victim of domestic violence, dating violence, sexual assault and/or stalking, BHA, may take such information into account in mitigation of potentially disqualifying information, such as poor credit history or previous damage to a dwelling. If requested by an applicant to take such mitigating information into account, BHA shall be entitled to conduct such inquiries as are reasonably necessary to verify the claimed history of domestic violence, dating violence, sexual assault and/or stalking and its probable relevance to the potentially disqualifying information. BHA may disregard or mitigate potentially disqualifying information if the applicant household includes a perpetrator of a previous incident or incidents of domestic violence, dating violence, sexual

assault and/or stalking.

VI. Termination of Tenancy or Assistance

A. VAWA Protections. Under VAWA, public housing residents, and persons assisted under the Section 8 rental assistance program, have the following specific protections, which will be observed by BHA in administration of its programs:

1. An incident or incidents of actual or threatened domestic violence, dating violence, sexual assault or stalking will not be considered to be a “serious or repeated” violation of the lease by the victim or threatened victim of that violence and will not be good cause for terminating the tenancy or occupancy rights of or assistance to the victim of that violence.

2. In addition to the foregoing, tenancy or assistance will not be terminated by BHA as a result of criminal activity, if that criminal activity is directly related to domestic violence, dating violence, sexual assault or stalking engaged in by a member of the assisted household, a guest or another person under the tenant’s control, and the tenant or an affiliated individual is the victim or threatened victim of this criminal activity. However, the protection against termination of tenancy or assistance described in this paragraph is subject to the following limitations:

(a) Nothing contained in this paragraph shall limit any otherwise available authority of BHA or a Section 8 owner or manager to terminate tenancy, evict, or to terminate assistance, as the case may be, for any violation of a lease or program requirement not premised on the act or acts of domestic violence, dating violence, sexual assault or stalking in question against the tenant or a member of the tenant’s household. However, in taking any such action, neither BHA nor a Section 8 manager or owner may apply a more demanding standard to the victim of domestic violence, dating violence, sexual assault or stalking than that applied to other tenants.

(b) Nothing contained in this paragraph shall be construed to limit the authority of BHA or a Section 8 owner or manager to evict or terminate from assistance any tenant or lawful applicant if the owner, manager or BHA, as the case may be, can demonstrate an actual and imminent threat to other tenants or to those employed at or providing service to the property, if the tenant is not evicted or terminated from assistance.

(c) Nothing contained in this paragraph shall limit any otherwise available authority of the BHA, or a Section 8 owner or manager to honor various court orders issued to either protect the victim or address the distribution of property in case of a household breaks up.

B. Removal of Perpetrator. Further, notwithstanding anything in paragraph VI.A.2. or Federal, State or local law to the contrary, BHA or a Section 8 owner or manager, as the case may be, may bifurcate a lease, or remove a household member from a lease, without regard to whether a household member is a signatory to a lease, in

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order to evict, remove, terminate occupancy rights, or terminate assistance to any individual who is a tenant or lawful occupant and who engages in acts of physical violence against an affiliated individual or other individual. Such action against the perpetrator of such physical violence may be taken without evicting, removing, terminating assistance to, or otherwise penalizing the victim of such violence who is also the tenant or an affiliated individual. Such eviction, removal, termination of occupancy rights, or termination of assistance shall be effected in accordance with the procedures prescribed by law applicable to terminations of tenancy and evictions by BHA. If such bifurcation occurs, and the removed tenant or lawful occupant was the sole tenant eligible to receive assistance the BHA will provide any remaining household member the opportunity to establish eligibility for housing.

Leases used for all public housing operated by BHA and leases for dwelling units occupied by families assisted with Section 8 rental assistance administered by BHA, shall contain provisions setting forth the substance of this paragraph or as required by the U.S. Department of Housing & Urban Development.

VII. Verification of Domestic Violence, Dating Violence, Sexual Assault, or Stalking

A. Requirement for Verification. For those seeking protection under this Policy, the law allows, but does not require, BHA or a section 8 owner or manager to verify that an incident or incidents of actual or threatened domestic violence, dating violence, sexual assault or stalking claimed by a tenant or an affiliated individual is bona fide and meets the requirements of the applicable definitions set forth in this policy. Subject only to waiver as provided in paragraph VII. C., BHA shall require verification in all cases where an individual claims protection against an action involving such individual proposed to be taken by BHA. If there is reason to believe that verification is incomplete or inaccurate, the BHA may require additional documentation of the incident(s). Such documentation requirement shall not place the victim in danger. As necessary, the BHA shall work with the victim to identify appropriate sources of documentation. Section 8 owners or managers receiving rental assistance administered by BHA may elect to require verification, or not to require it as permitted under applicable law.

Verification of a claimed incident or incidents of actual or threatened domestic violence, dating violence, sexual assault or stalking can be accomplished in one of the following three ways:

1. HUD-approved form - by providing to BHA or to the requesting Section 8 owner or manager a written certification, on a form approved by the U.S. Department of Housing and Urban Development (HUD) and available from BHA, that the individual is a victim of domestic violence, dating violence, sexual assault or stalking; that the incident or incidents in question are bona fide incidents of actual or

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threatened abuse meeting the requirements of the applicable definition(s) set forth in this policy. The incident or incidents in question must be described in reasonable detail as required in the HUD-approved form, and the completed certification must include the name of the perpetrator. If there is reason to believe that the certification is incomplete or inaccurate, the BHA may require additional documentation of the incident(s). Such documentation requirement shall not place the victim in danger. As necessary, the BHA shall work with the victim to identify appropriate sources of documentation.

2. Other documentation - by providing to BHA or to the requesting Section 8 owner or manager documentation signed by an employee, agent, or volunteer of a victim service provider, an attorney, or a medical professional, from whom the victim has sought assistance in addressing the domestic violence, dating violence, sexual assault or stalking, or the effects of the abuse, described in such documentation or a record of an administrative agency or documentation signed by the applicant or tenant and a mental health professional from whom the applicant or tenant has sought assistance relating to domestic violence, sexual assault or stalking, or the effect of such actions, and states under penalty of perjury, that the mental health professional believes that the domestic violence, dating violence, sexual assault, or stalking meets the requirement found in VAWA 2013. A form is available from BHA. The professional providing the documentation must sign and attest under penalty of perjury (28 U.S.C. 1746) to the professional's belief that the incident or incidents in question are bona fide incidents of abuse meeting the requirements of the applicable definition(s) set forth in this policy. The victim of the incident or incidents of domestic violence, dating violence, sexual assault or stalking described in the documentation must also sign and attest to the documentation under penalty of perjury.

3. Police or court record – by providing to BHA or to the requesting Section 8 owner or manager a Federal, State, tribal, territorial, or local police or court record describing the incident or incidents in question.

B. Time allowed to provide verification/ failure to provide. An individual who claims protection against adverse action based on an incident or incidents of actual or threatened domestic violence, dating violence, sexual assault or stalking, and who is requested by BHA, or a Section 8 owner or manager to provide verification, must provide such verification within 14 business days (i.e., 14 calendar days, excluding Saturdays, Sundays, and federally-recognized holidays) after receipt of the request for verification. Failure to provide verification, in proper form within such time will result in loss of protection under VAWA and this policy against a proposed adverse action. Time for response will be extended upon a showing of good cause.

C. Waiver of verification requirement. The Administrator of the BHA or her Designee, or a Section 8 owner or manager, may, with respect to any specific case, waive the above-stated requirements for verification and provide the benefits of this policy based on the victim's statement or other corroborating evidence. Such waiver may be granted in the sole discretion of the Administrator/Designee, owner or manager. Any such waiver must be in writing. Waiver in a particular instance or

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instances shall not operate as precedent for, or create any right to, waiver in any other case or cases, regardless of similarity in circumstances.

VIII. Confidentiality

A. Right of confidentiality. All information (including the fact that an individual is a victim of domestic violence, dating violence, sexual assault or stalking) provided to BHA or to a Section 8 owner or manager in connection with a verification required under section VII of this policy or provided in lieu of such verification where a waiver of verification is granted, shall be retained by the receiving party in confidence and shall not be entered in any shared database nor provided to any related entity, except where disclosure is:

1. requested or consented to by the individual in writing, or
2. required for use in a public housing eviction proceeding or in connection with termination of Section 8 assistance, as permitted in VAWA, or
3. otherwise required by applicable law.

B. Notification of rights. All tenants of public housing and tenants participating in the Section 8 rental assistance program administered by BHA shall be notified in writing concerning their right to confidentiality and the limits on such right to confidentiality.

IX. Transfer to New Residence

A. Application for transfer. The opportunity to transfer in Public Housing due to incidents of domestic violence, dating violence, sexual assault and/or stalking is described in the BHA's Admissions and Continued Occupancy Policy (ACOP). The opportunity to relocate in the Section 8 rental assistance program due to incidents of domestic violence, dating violence and/or stalking is described in the BHA Administrative Plan. Except with respect to portability of Section 8 assistance, as provided in section B below, the decision to approve or disapprove a transfer shall be made in accordance with the ACOP or Administrative Plan, as applicable. This policy does not create any additional right on the part of any public housing tenant or Section 8-assisted tenant to be granted a transfer.

B. Portability. Notwithstanding the foregoing, a Section 8-assisted tenant will not be denied portability to a unit in another location (notwithstanding the term of the tenant's existing lease has not expired, or the family has not occupied the unit for 12 months) so long as the tenant has complied with all other requirements of the Section 8 program and has moved from the unit in order to protect the health or safety of an individual member of the household who is or has been the victim of domestic violence, dating violence, sexual assault or stalking and who reasonably believes that the tenant or other household member will be imminently threatened by harm from further violence if the individual remains in the present dwelling unit.

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X. Court Orders/Family Break-up

A. Court orders. It is BHA's policy to honor orders entered by courts of competent jurisdiction affecting individuals assisted by BHA and their property. This includes cooperating with law enforcement authorities to enforce civil protection orders issued for the protection of victims and addressing the distribution of personal property among household members in cases where a family breaks up.

B. Family break-up. Other BHA policies regarding family break-up are contained in BHA's ACOP and its Section 8 Administrative Plan.

XI. Relationships with Service Providers

It is the policy of BHA to cooperate with organizations and entities, both private and governmental, that provide shelter and/or services to victims of domestic violence, dating violence, sexual assault and/or stalking. If BHA staff become aware that an individual assisted by BHA is a victim of domestic violence, dating violence or stalking, BHA will provide the victim with written materials about such providers of shelter or services. However, and notwithstanding the foregoing, this Policy does not create any legal obligation requiring BHA either to maintain a relationship with any particular provider of shelter or services to victims of domestic violence, dating violence, sexual assault and/or stalking or to make a referral in any particular case. BHA's annual public housing agency plan shall describe those providers of shelter or services to victims of domestic violence, dating violence and/or stalking known to BHA.

XII. Notification

BHA shall provide written notification to applicants, tenants, and Section 8 owners and managers, concerning the rights and obligations created under VAWA relating to confidentiality, denial of assistance and, termination of tenancy or assistance.

XIII. Relationship with Other Applicable Laws

Neither VAWA nor this Policy implementing it shall preempt or supersede any provision of Federal, State or local law that provides greater protection than that provided under VAWA for victims of domestic violence, dating violence sexual assault, or stalking.

XIV. Amendment

This policy may be amended from time to time by BHA as approved by its Administrator following an opportunity for notice and comment by interested parties.

Description of Violence Against Women Act (VAWA) activities, services, or programs:

BHA staff provide information and referral services to victims of domestic violence. Periodic VAWA and domestic violence trainings have occurred and will continue to occur with both internal and external trainers.

Both the Public Housing Admissions and Continued Occupancy Policy and the Leased Housing Administrative Plan contain a priority for serving victims of domestic violence for admission. The BHA public housing transfer policy gives a priority for victims of domestic violence as an Administrative transfer.

The BHA public safety department provides protective services above and beyond that of the Boston Police Department to BHA victims of domestic violence to both prevent domestic violence and to enhance survivor safety. BHA Police Department Officers receive extensive police academy training and updates on domestic violence. They are able to advise victims as to seeking protective orders and resources.

A partial listing of Violence Against Women Act (VAWA) Resources is below. These resources are posted on the BHA public drive and all staff have been advised of its location alongside the VAWA policy. In addition, the BHA will create a VAWA resources link section on its website.

A partial listing of Violence Against Women Act Resources:

Asian Task Force Against Domestic Violence (Boston office)	617-338-2350x244
Asian Task Force Against Domestic Violence (Lowell, MA office)	978-454-3651
Asian Task Force Against Domestic Violence 24hr. Multilingual Hotline	617-338-2355
Association of Haitian Women in Boston	617-287-0096
AWAKE program (Children's Hospital)	617 – 355 – 6369
BARCC 24hr. Boston Area Rape Crisis Center	617-492-7273
Boston Area Rape Crisis Center (Cambridge, MA)	617-492-8306 x1262
Boston Medical Center	617-414-7734
Boston Police 24hr. Domestic Violence Unit	617-343-4350
Center for Violence Prevention and Recovery at Beth Israel Deaconess Medical Center	617-667-8141
Community Legal Services and Counseling Center (Cambridge, MA)	617-661-1010x146

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Cooperative Economics for Women (Revere, MA)	781-289-4950
Crittenton Women's Union	617 – 661 – 7203
Department of Social Services	1-800-792-5200
Disability Abuse 24hr. Hotline	1-800-426-9009
Domestic Violence services Network (Concord, MA)	978-318-3421
Domestic Violence / Sexual Assault Program Of Newton Wellesley Hospital	617-243-6521
DOVE, Inc. (Quincy)	888-314-3683
Elder Abuse 24hr. Hotline	1-800-922-2275
Elizabeth Stone House	617 – 427 – 9801
Finding Options for Change Understanding and Safety (Lowell, MA)	978-458-6282
FINEX House	617-288-1054
Gay Mens' Domestic Violence Project	800-832-1901
Greater Boston Legal Services	617-371-1234
Greater Boston Legal Services (alternate number)	617-603-1614
HaborCOV (Chelsea, MA)	617-884-9799x137 or 617–884–9909
HAVEN at MGH	617 -724-0054
Independence House (Hyannis, MA)	508-771-6507x243
International Institute of Boston	617-695-9990x172
Jewish Family and Children's Services (Waltham, MA)	781-647-5327
Lowell Community Health Center (Lowell, MA)	978-746-3147
Massachusetts Alliance of Portuguese Speakers (Cambridge, MA)	617-864-7600
Mass Coalition for the Deaf and Hard of Hearing TTY	617-695-7600 TTY
MGH Chelsea Health Care Center (Chelsea, MA)	617-887-4224
Massachusetts Department of Transitional Assistance (Domestic Violence Specialists)	617-348-8500
Massachusetts Immigrant and Refugee Advocacy Coalition	617-350-5480x216
Massachusetts Law Reform Institute	617-357-0700x305
Massachusetts Office for Victim Assistance	617-727-5200
Mayor's 24hr. Housing Hotline	617-635-4500
Merrimack Valley Legal Services, Inc. (Lowell, MA)	978-888-0004
Multicultural AIDS Coalition	617-442-1622
Newton Wellesley Hospital (Newton, MA)	617-243-6521
Nigerian American Community Organization	617-424-7890
Nigerian American Community	617-913-5684

Organization (alternate number)	
Parental Stress 24hr. Hotline	1-800-632-8188
Passageway at Brigham & Women's Hospital	617 – 732 – 8753
Portal to Hope (Salisbury)	781 – 306 – 6678
REACH Beyond Domestic Violence (Waltham)	800 – 899 – 4000
Refugee and Immigrant Assistance Center	617-238-2434
Renewal House	617 – 566 – 6881
RESPOND, Inc. (Somerville)	617-623-5900
“SafeLink 24hr. Statewide Domestic Violence Hotline Operated by Casa Myrna Vasquez”	1-877-785-2020
SafeLink 24hr. Statewide Domestic Violence Hotline TTY Operated by Casa Myrna Vasquez	877-521-2601 TTY
SAHELI: Friendship for South Asian Women	866 – 472 - 4354
Samaritans 24hr. Suicide Hotline	617-247-0220
Simmons College	617-521-2480
Somerville Commissions (Somerville, MA)	617-625-6600x2406
Teen 24hr. Hotline	1-800-999-9999
The Network/La Red (ending abuse in lesbian, bisexual, and transgender communities)	617-742-4911 TTY: 617-338-SAFE (7833)
The Second Step (Newton)	617 – 661 – 7203
Transition House (Cambridge, MA)	617-868-1655
United Way Help Line	1-800-231-4377
Victim Rights Law Center	617-399-6720
Whittier Street Health Center	617-989-3249

10. Pets

Summary of the Elderly/Disabled Pet Policy and the Family Pet Policy

In compliance with HUD requirements, the Boston Housing Authority has adopted pet policies and rules for all developments authorizing the keeping of pets in BHA developments. The primary purpose of the rules is to establish reasonable requirements for the keeping of common household pets in order to provide a safe and sanitary environment. The complete BHA Family Pet Policy and BHA Elderly/Disabled Pet Policy and necessary forms are available at your Manager's office. The Elderly/Disabled Pet Policy was adopted and put into effect in October, 2000 and differs in some respects from the Family Pet Policy. The Family Pet Policy was adopted and put in effect in April, 2002. The following is only a summary of the Pet policies. The complete Elderly/Disabled Pet Policy and Family Pet Policy are supporting documents to the Agency Plan. If you have questions please consult the appropriate policy or ask your Manager.

Definitions of Pet and Assistive Animal:

A pet is defined as a domesticated animal of a species that is commonly kept as a household pet in the community, such as a cat, dog, or canary. A monkey, snake, or spider is an example of an animal that is not commonly kept as a household pet in the community. An assistive animal provides assistance to a person with disabilities that is needed as a reasonable accommodation. Under 24CRF 960.705, this policy does not apply to assistive animals that reside in public housing or that visit BHA properties. For further information on assistance and service animals, please refer to the BHA Assistance and Service Animal Policy, which is found in the Appendix of the BHA Reasonable Accommodation Policy.

Types and Number of Pets Allowed:

Family Developments, a maximum of two pets: a cat or a dog, and either a caged bird or birds, or a fish tank not to exceed 20 gallons will be allowed in studio, one- and two- bedroom apartments. However, in place of the fish tank or the birdcage an animal cage of equivalent size housing a reasonable number of hamsters, guinea pigs, ferrets, or gerbils may be kept. A maximum of three pets: a cat or a dog, a caged bird or birds, and a maximum 20-gallon fish tank will be allowed in apartments of three bedrooms or more. Again, in place of the fish tank or the bird cage an animal cage of equivalent size housing a reasonable number of hamsters, guinea pigs, ferrets or gerbils may be kept. A reasonable number of fish or other animals appropriately kept in an aquarium (such as a frog or iguana) will be permitted in a maximum 20-gallon fish tank. A reasonable number shall be the number of animals or fish that may be kept in a similarly sized cage or tank as recommended by a veterinarian.

Elderly/Disabled Developments, a maximum of one cat or dog is allowed per

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apartment. No elderly/disabled resident shall have more than two birds. No resident shall have more than one aquarium, which shall not have a capacity of more than 20 gallons. A reasonable number of fish or animals suitable for keeping in an aquarium will be permitted. A resident may have a birdcage and an aquarium. Any resident who has a dog or a cat may, in addition, have either an aquarium or a bird but not both. For example you may have a poodle and a canary or a Siamese cat and a canary or a poodle and an aquarium.

Pets of vicious or aggressive disposition deemed by management to be potentially harmful to the health and safety of others are prohibited.

Family Developments, no pet will be permitted which is expected to exceed 50 pounds in weight at maturity.

Elderly/Disabled, no pet may exceed 40 pounds in weight or 20 inches in height at maturity.

All dogs and cats over the age of 6 months must be spayed or neutered unless there is certification from a licensed veterinarian that the performance of the procedure will compromise the health of the pet.

Pet Ownership Rules:

A tenant who wishes to add any new pet must apply in writing at their development management office. The Tenant is responsible for proper care, vaccinations, and clean up after their pet anywhere on BHA property, as well as the provision of identifying tags for dogs and cats. No pet is to remain unattended, without proper care for more than 24 hours. The tenant is responsible and must pay for the cost of all materials and labor required to repair any damage caused by the pet. The tenant is responsible for insuring that the rights of other tenants are not infringed upon with regard to health, safety, or peace and quiet enjoyment. The Tenant will allow the BHA to inspect their unit as required to ascertain compliance with this policy. Pets currently being kept by BHA residents that have been properly identified to site management will be grandfathered into this policy. No pet ownership fee will be charged for these pets but owners must prospectively comply with this policy.

Non-Compliance:

Violations of these rules will be considered a violation of a material term of the lease. The development manager may require the removal of a pet upon violation of these rules, or commence eviction procedures. All lease enforcement and eviction actions taken as a result of this policy will comply with the BHA's Lease and Grievance Procedures.

11. Asset Management

1. : Yes : No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have not been addressed elsewhere in this PHA Plan?

2. What types of asset management activities will the PHA undertake? (select all that apply)

: Not applicable

: Private management

: Development-based accounting

: Comprehensive stock assessment

: Other: (list below) strategic redevelopment planning; reorganization for Asset Management staffing functions

3. : Yes : No: Has the PHA included descriptions of asset management activities in the optional Public Housing Asset Management Table?

12. and 13. Substantial Deviation / Significant Amendment / Modification

(a) Significant Amendment and Substantial Deviation/Modification. Provide the PHA's definition of "significant amendment" and "substantial deviation/modification".

Definition of "Substantial Deviation" and "Significant Amendment or Modification":

In the Final Rule issued on 12/14/99, HUD provides that, while PHAs may change or modify their plans or policies described in them, any "significant amendment or modification" to the plan would require PHAs to submit a revised PHA plan that has met full public process requirements. The statute also requires that PHAs define "significant amendment or modification" of the Annual Plan and "substantial deviation" from the 5- Year Plan themselves, by stating the basic criteria for such definitions in an annual plan that has met full public process requirements, including Resident Advisory Board review. The BHA will consider the following actions to be significant amendments or modifications:

- A change which would significantly affect current rent or admissions policies or organization of a waiting list in the Public Housing programs;
- A change which would significantly effect current rent policies in the Section 8 Program;
- A change to admission policies or organization of a waiting list in the Section 8 Program which would impact more than 5% of the total number of HCVP vouchers in the BHA's portfolio.
- Additions of non-emergency work items not included in the current Annual Statement, 5-Year Action Plan, over \$3 million or 10% of total CFP, whichever is greater;
- A substantial change to the demolition or disposition, designation, homeownership programs or conversion activities as described in the presently approved Agency or Five-Year Plan.

An exception to this definition will be made for any of the above that are adopted to reflect changes in HUD regulatory requirements or federal statutory requirements; such changes will not be considered significant amendments by HUD.

Section B.2

14. Hope VI or Choice Neighborhoods

Include statements related to these programs as applicable.

a) Hope VI or Mixed Finance Modernization or Development

Yes: No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)

b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name: Anne M. Lynch Homes at Old Colony Phase Two
2. Development (project) number: MA002000124 (original); MA002002139 (new phase 2A); MA002002140 (new phase 2B); and MA002002143 (new phase 2C)
HOPE VI GrantNo. (MA06URD002I110)
3. Status of Grant: (select the statement that best describes the current status)
 : Revitalization of Plan under development
 : Revitalization Plan submitted, pending approval
 : Revitalization Plan approved
 : Activities Pursuant to an approved Revitalization Plan complete.

Choice Neighborhoods Initiative Implementation grant

1. Development name: Whittier Street
2. Development (project) number: MA002000111 (original); New development to be project-based vouchers
3. Status of Grant: (select the statement that best describes the current status)
 : Revitalization of Plan under development
 : Revitalization Plan submitted, pending approval
 : Revitalization Plan approved
 : Activities Pursuant to an approved Transformation Plan underway.

Yes:

No: c.) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?

If yes, list development name/s below:

The BHA applied for and was awarded a Choice Neighborhoods Implementation grant to transform the Whittier Street public housing development in 2016.

15. Mixed Finance Modernization or Development

Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?

If yes, list developments or activities below:

- (i) Whittier (redevelopment)
- (ii) Anne M. Lynch Homes at Old Colony – Phase Three (RAD and Section 8 redevelopment)
- (iii) West Newton (RAD and Section 8 modernization)
- (iv) Clippership (Section 8 redevelopment)
- (v) Amory (Section 8 modernization and redevelopment)
- (vi) RAD conversions at St. Botolph, Bunte (Walnut Park), Ausonia, Long Glen, Eva White, Heritage Apartments, Lower Mills Apartments, and Mission Main.
- (vii) Lenox (RAD and Section 8 modernization)

Planning for mixed-finance activities at Charlestown, Lenox, Mary Ellen McCormack, Hailey Apartments, and Eva White. See Demolition/Disposition Section for descriptions.

16. Demolition and or Disposition

Yes No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to next component; if “yes”, complete one activity description for each development.)

2. Activity Description

Yes No: Has the PHA provided the activities description information in the optional Public Housing Asset Management Table? (If “yes”, skip to next component. If “No”, complete the Activity Description table below.)

Demolition/Disposition Activity Description

1a. Development Name: Anne M. Lynch Homes at Old Colony Phase Three

1b. Development (project) number: MA00200124

2. Activity type: Demolition: X

Disposition: X

3. Application Status (select one)

Approved: X

Submitted, pending approval:

Planned Application:

4. Date application approved: 06/11/2018

5. Number of units affected: 443 (not including units converting under RAD)

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity:

a. Actual or projected start date of activity: Projected start of demolition—01/01/2019

b. Projected end date of activity: 2025

Demolition/Disposition Activity Description

1a. Development Name: Whittier

1b. Development (project) number: MA00200111

2. Activity type: Demolition: X

Disposition: X

3. Application Status (select one)

Approved: X

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Submitted, pending approval:

Planned Application:

4. Date application approved: 09/25/2017 (Demolition); 12/14/2017 (Demolition)

5. Number of units affected: 200

6. Coverage of action (select one):

Part of the Development:

Total Development: X

7. Timeline for activity:

a. Actual or projected start date of activity: Application filed in 2017

b. Projected end date of activity: 2023

BHA was awarded an FY2016 Choice Neighborhoods implementation grant in Dec 2016, pursuant to which HUD granted demolition approval in September 2017.

Disposition approval was granted in December 2017. Demolition and disposition activities are being carried out in phases.

Demolition/Disposition Activity Description

1a. Development Name: Vacant Land Parcel at Mary Ellen McCormack (O'Connor Way)

1b. Development (project) number: MA00200123

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved: X

Submitted, pending approval:

Planned Application:

4. Date application approved: August 12, 2016.

5. Number of units affected: 0 units; vacant land only

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity:

a. Actual or projected start date of activity: Construction start late 2018.

b. Projected end date of activity: 2020

Demolition/Disposition Activity Description

1a. Development Name: Charlestown

1b. Development (project) number: MA00200101

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved: X

Submitted, pending approval:
Planned Application:
4. Date application approved: September 6, 2017.
5. Number of units affected: 1100
6. Coverage of action (select one):
Part of the Development:
Total Development: X
7. Timeline for activity:
a. Actual or projected start date of activity: 2019 b. Projected end date of activity:
TBD

Demolition/Disposition Activity Description

1a. Development Name: Amory
1b. Development (project) number: MA00200245
2. Activity type: Demolition:
Disposition: X
3. Application Status (select one)
Approved: X
Submitted, pending approval:
Planned Application:
4. Date application approved: 07/20/2018
5. Number of units affected: 216 dwelling (including nonresidential); 18 non-dwelling
6. Coverage of action (select one):
Part of the Development:
Total Development: X
7. Timeline for activity: Approved in July 2018.
a. Actual or projected start date of activity: late 2018. b. Projected end date of activity: 2024

A Section 18 disposition was approved by HUD in July 2018 based in part on the high projected rehab costs, which cannot be met through a RAD conversion. BHA will seek Tenant Protection Vouchers that will be project-based at the property in order to support the needed renovations. In its July 2018 approval, HUD approved a Section 18 disposition of unused (vacant) portions of the site in order to permit construction of new housing adjacent to the existing building.

Demolition/Disposition Activity Description

1a. Development Name: Clippership Units at Heritage Development
1b. Development (project) number: MA00200252
2. Activity type: Demolition: X
Disposition: X

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3. Application Status (select one)

Approved:

Submitted, pending approval: X June 25, 2017

Planned Application:

4. Date application approved:

5. Number of units affected: 0 public housing units (20 Section 8 units)

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity:

a. Actual or projected start date of activity: late 2018 b. Projected end date of activity: 2020

Note: The Clippership Units at Heritage are Project-Based Section 8 Units and are not subject to Section 8 disposition requirements. This information is being included for informational purposes only.

Demolition/Disposition Activity Description*

1a. Development Name: West Newton/Rutland/East Springfield

1b. Development (project) number: MA00200158

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved: X (in conjunction with RAD conversion)

Submitted, pending approval:

Planned Application:

4. Date application approved:

5. Number of units affected: 25% of units (36) will be converted to Project-Based Voucher, plus 3 de minimis at E. Springfield will be offered for sale with a priority to redevelop as affordable housing.

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity: Application 2017.

a. Actual or projected start date of activity: late 2018 b. Projected end date of activity: 2020

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description

1a. Development Name: Mildred Hailey Apts Phase One

1b. Development (project) number: MA002107119 (partial)

2. Activity type: Demolition: X

Disposition: X

3. Application Status (select one)

Approved:

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Submitted, pending approval:

Planned Application: X

4. Date application approved: Not yet submitted.

5. Number of units affected: 253 public housing units

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity: Application 2019.

a. Actual or projected start date of activity: 2020 b. Projected end date of activity:

TBD. Plans at Mildred C. Hailey Apartments call for the demolition of eight buildings comprising 253 units, to be replaced with 253 new deeply affordable units as well as other moderate and market units. Planning is in early stages.

Demolition/Disposition Activity Description

1a. Development Name: Mary Ellen McCormack

1b. Development (project) number: MA002000123

2. Activity type: Demolition: X

Disposition: X

3. Application Status (select one)

Approved:

Submitted, pending approval:

Planned Application: X

4. Date application approved: Not yet submitted.

5. Number of units affected: 1016 public housing units

6. Coverage of action (select one):

Part of the Development:

Total Development: X

7. Timeline for activity: Application 2019.

a. Actual or projected start date of activity: 2021 b. Projected end date of activity:

TBD. The proposed initiative is to replace all 1016 existing public housing units 1:1, and to add additional market, retail and open space uses to the site. In all, 3000 new units are planned but the plans are preliminary and still need to undergo significant public review.

Demolition/Disposition Activity Description*

1a. Development Name: Eva White

1b. Development (project) number: MA00200241

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved:

Submitted, pending approval:

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Planned Application: X

4. Date application approved:

5. Number of units affected: 102

6. Coverage of action (select one):

Part of the Development:

Total Development: X

7. Timeline for activity: Application 2019.

a. Actual or projected start date of activity: 2019.

b. Projected end date of activity: TBD

BHA has designated a developer team to take ownership of Eva White and renovate the building, retaining all units as deeply affordable housing. At this time we intend to pursue RAD in connection with the disposition.

*BHA may blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

1a. Development Name: Lenox

1b. Development (project) number: MA002000104

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved: X (in conjunction with RAD conversion)

Submitted, pending approval:

Planned Application:

4. Date application approved: Not yet submitted.

5. Number of units affected: 25% of units (71 out of 285) will be converted to PBV

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity: Application 2019.

a. Actual or projected start date of activity: 2019 b. Projected end date of activity: 2021

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

1a. Development Name: St. Botolph

1b. Development (project) number: MA002000253

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved:

Submitted, pending approval: X (in conjunction with RAD conversion)

Planned Application:

4. Date application approved: To be approved with RAD conversion

5. Number of units affected: 25% of units (33 out of 135) to be converted to Project-Based Voucher (PBV)

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity:

a. Actual or projected start date of activity: 2019 b. Projected end date of activity: 2021

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

1a. Development Name: Doris Bunte Apts. (Walnut Park)

1b. Development (project) number: MA002000242

2. Activity type: Demolition:

Disposition: X

3. Application Status (select one)

Approved:

Submitted, pending approval: X (in conjunction with RAD conversion)

Planned Application:

4. Date application approved: To be approved with RAD conversion

5. Number of units affected: 25% of units (41 out of 165) to be converted to Project-Based Voucher (PBV)

6. Coverage of action (select one):

Part of the Development: X

Total Development:

7. Timeline for activity:

a. Actual or projected start date of activity: 2019 b. Projected end date of activity: 2021

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

- 1a. Development Name: Ausonia
 - 1b. Development (project) number: MA002000261
 - 2. Activity type: Demolition:
Disposition: X
 - 3. Application Status (select one)
Approved:
Submitted, pending approval: X (in conjunction with RAD conversion)
Planned Application:
 - 4. Date application approved: To be approved with RAD conversion
 - 5. Number of units affected: 25% of units (25 out of 100) will be converted to Project-Based Voucher (PBV)
 - 6. Coverage of action (select one):
Part of the Development: X
Total Development:
 - 7. Timeline for activity:
a. Actual or projected start date of activity: 2019 b. Projected end date of activity: 2021
- *BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

- 1a. Development Name: Malone
 - 1b. Development (project) number: MA00200290
 - 2. Activity type: Demolition:
Disposition: X
 - 3. Application Status (select one)
Approved:
Submitted, pending approval:
Planned Application: X
 - 4. Date application approved:
 - 5. Number of units affected: 102
 - 6. Coverage of action (select one):
Part of the Development:
Total Development: X
 - 7. Timeline for activity: TBD
a. Actual or projected start date of activity: TBD.
b. Projected end date of activity: TBD
- *BHA may blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

- 1a. Development Name: West Ninth

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- 1b. Development (project) number: MA00200236
 - 2. Activity type: Demolition:
Disposition: X
 - 3. Application Status (select one)
Approved:
Submitted, pending approval:
Planned Application: X
 - 4. Date application approved:
 - 5. Number of units affected: 84
 - 6. Coverage of action (select one):
Part of the Development:
Total Development: X
 - 7. Timeline for activity: TBD
 - a. Actual or projected start date of activity: TBD.
 - b. Projected end date of activity: TBD
- *BHA may blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition/Disposition Activity Description*

- 1a. Development Name: Annapolis
 - 1b. Development (project) number: MA00200227
 - 2. Activity type: Demolition:
Disposition: X
 - 3. Application Status (select one)
Approved:
Submitted, pending approval:
Planned Application: X
 - 4. Date application approved:
 - 5. Number of units affected: 56
 - 6. Coverage of action (select one):
Part of the Development:
Total Development: X
 - 7. Timeline for activity: TBD
 - a. Actual or projected start date of activity: TBD.
 - b. Projected end date of activity: TBD
- *BHA may blend Section 18 and RAD pursuant to PIH Notice 2018-04.

17. Designated Housing for Elderly and Disabled Families

1. : Yes : No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If "No", skip to the next component. If "yes", complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to the next component.)

2. Activity Description

: Yes : No: Has the PHA provided all required activity description information for this component in the optional Public Housing Asset Management Table? If "yes", skip to the next component. If "No", complete the Activity Description table below.

Designation of Public Housing Activity Description

1a. Development name: All Elderly/Disabled Program Developments (See supplemental table below)

1b. Development (project) number: All Elderly/Disabled Program Developments (See supplemental table below)

2. Designation type:

Occupancy by only the elderly :

Occupancy by families with disabilities :

Occupancy by only elderly families and families with disabilities : (in ratio of 80% elderly, 20% disabled at each site)

3. Application status (select one)

Approved; included in the PHA's Designation Plan :

Submitted, pending approval :

Planned application :

4. Date this designation approved, submitted, or planned for submission:

Approved on 06/25/15.

5. If approved, will this designation constitute a (select one)

: New Designation Plan

: Revision of a previously-approved Designation Plan

6. Number of units affected: 3394

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7. Coverage of action (select one)

X: Part of the development (See supplemental table below)

___: Total development

The new DHP applies to all units across the Elderly-Disabled portfolio except for wheelchair units, all of which are exempt from the DHP. BHA continues to monitor the percentages of elderly and non-elderly disabled households living in each Elderly/Disabled Development on an ongoing basis. When the percentage of elderly households occupying a development reaches 75%, the development is flagged so that each subsequent offer of housing will be reviewed by a Manager in the Occupancy Department. When the percentage of elderly households occupying a development reaches 80%, the BHA will turn off Designated Housing preference points to elderly applicant households for this development and turn on the Designated Housing preference for the disabled. If the percentage of elderly households occupying a development falls below 80%, the BHA will turn on Designated Housing Preference points to elderly applicant households for this development.

Federal Elderly/Disabled Development Designation*†

Development Number	Development Name	Available Units	Wheelchair Units	Adj. Avail	Eld.80%	Non-Eld/ Dis 20%	0 BR W/C	1 BR W/C	2 BR W/C
MA002000226	Pond Street	44		44	35	9	0	40	4
MA002000227	Annapolis Street	56		56	45	11	0	50	6
MA002000228	Ashmont Street	54		54	43	11	0	48	6
MA002000229	Holgate Apartments	81	1	80	65	16	0	81	0
MA002000230	Foley Apartments	96	6	90	77	19	0	96	0
MA002000232	Groveland	48		48	38	10	27	19	2
MA002000234	Davison	47		47	38	9	31	16	0
MA002000235	Washington Street	82	1	81	66	16	0	72	10
MA002000236	West Ninth Street	84		84	67	17	0	76	8
MA002000237	J J Carroll	64		64	51	13	0	52	12
MA002000238	Meade Apartments	40		40	32	8	0	38	2
MA002000240	MLK Towers	104	1	103	83	21	26	78	0
MA002000241	Eva White	102		102	82	20	34	57	11
MA002000242	Doris Bunte	165	4	161	132	33	106	51	8
MA002000244	Frederick Douglas	78	8	70	62	16	42	35	1
MA002000247	General Warren	96		96	77	19	56	36	4
MA002000249	Torre Unidad	199	9	190	159	40	112	83	4
MA002000250	Rockland Towers	69	4	65	55	14	41	26	2
MA002000251	Codman Apartments	102	9	93	82	20	61	30	11
MA002000253	St Botolph Street	132	10	122	106	26	82	47	3

MA002000254	Pasciucco	92	6	86	74	18	64	26	2
MA002000261	Ausonia Homes	100	5	95	80	20	0	93	7
MA002000262	Hassan Apartments	100	8	92	80	20	55	40	5
MA002000270	Spring Street	104	5	99	83	21	0	99	5
MA002000271	Patricia White	225	20	205	180	45	0	216	9
MA002000272	Roslyn Apartments	119	9	110	95	24	0	113	6
MA002000277	Bellflower Street	114	6	108	91	23	0	106	8
MA002000283	Peabody Square	103	9	94	82	21	0	98	5
MA002000290	Malone Apartments	102	4	98	82	20	0	101	1
MA002000295	Commonwealth	116	10	106	93	23	0	104	12
MA002000298	Hampton House	78	7	71	62	16	42	35	1
MA002000299	Washington Manor	77	7	70	62	15	41	35	1
MA002002141	Heritage - PHA Owned	31	2	29	25	6	22	3	6
MA002002142	Lower Mills-PHA	19	1	18	15	4	9	8	2
MA002107119	Mildred C. Hailey -	56		56	45	11	0	42	14
Totals		3,179	152	3027	2,543	636	851	2,150	178

*Wheelchair units are exempt from the Designated Housing Plan so in the above table Available Units show the total number of available units, Wheelchair shows the number of wheelchair units and Adjusted Available shows the number of units included in the Designated Housing Plan. Another way of saying that is Available Units minus Wheelchair units equals Adjusted Available units. Elderly 80% shows of the adjusted available units how many are designated for the elderly, while Non-Eld Dis 20% shows of the adjusted available units how many are designated for the Non-Elderly Disabled. The final three columns 0 BR with W/C, 1 BR with W/C, and 2 BR with W/C shows the total number of units at the site with those bedroom sizes and includes the wheelchair units in the totals. In most cases one can figure out the bedrooms sizes of the wheelchair units.

** BHA has zero studio wheelchair units.

***Only includes units at 295 and 297 Centre Street, units #'s BP0003 - BP00028 and BP0033 - BP0056. Overall, this is a family development but these units are set aside for the elderly and non-elderly disabled and have their own site-based waiting list.

† Developments converting through RAD (see Section 19 below) will be removed from this list upon conversion, as they will no longer be public housing units.

18. Conversion of Public Housing to Tenant-Based Assistance

Boston Housing Authority Voluntary Conversion from Public Housing to Tenant-Based Assistance Initial Assessment

The Boston Housing Authority determined a Per Unit Monthly (PUM) cost for covered (general occupancy) developments including operating costs with tenant contribution (\$893.85) and capital (\$221.94) for a total of \$1115.79 PUM as of September 2018. We then compared that to the average Housing Assistance Payment at \$1345.61 plus the tenant's contribution at \$497.79 that amounted to \$1843.40 PUM as of September 2018. Therefore, the change to tenant-based assistance would not be cost effective. None of the general occupancy developments in the BHA's portfolio has reached the stage of obsolescence where it would be cost effective to convert to tenant-based assistance rather than to maintain it as public housing.

The BHA is not subject to computing the mandatory conversion calculation because none of our developments meet the 15% vacancy standard for identifying public housing developments subject to the required conversion.

The above formula applies to the following developments:

Development Name	Number of Occupied Units*
Alice Taylor	349
Anne M. Lynch Homes at Old Colony	430
Cathedral/Ruth Barkley Apts.	405
Charlestown	1,051
Commonwealth	269
Franklin Field	336
Lenox Street	272
Mary Ellen McCormack	999
Mildred C. Hailey (Bromley Park)	468
Mildred C. Hailey (Heath Street)	214
West Newton	123
Whittier Street	81

*As of September 2018

19. Conversion of Public Housing to Project-Based Assistance under RAD

Demolition / Disposition Activity Description*

1a. Development name: West Newton and Rutland E. Springfield

1b. Development (project) number: MA002000158

2. Activity type: Demolition:

Disposition: X

3. Application status (select one)

Approved: X Commitment to enter into Housing Assistance Payments (CHAP) dated 03/01/2017

Submitted:

Planned:

4. Date application approved: March 1, 2017

5. Number of units affected: 146 (of which 75% will be RAD and 25% will be Section 8*)

6. Coverage of action (select one)

Part of the development

X Total development

7. Timeline for activity:

a. Actual or projected start date of activity: RAD disposition application in 2016

b. Projected end date of activity: 2020

The BHA plans to preserve West Newton as affordable housing under alternative ownership.

8. Development description: Family development

9. Bedroom distribution:

0-BR	1-BR	2-BR	3-BR	4-BR	5-BR	Total units
44	58	20	11	12	1	146

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition / Disposition Activity Description*

1a. Development name: Lenox

1b. Development (project) number: MA002000104

2. Activity type: Demolition:

Disposition: X

3. Application status (select one)

Approved: X Commitment to enter into Housing Assistance Payments (CHAP) dated 10/16/2017

Submitted:

Planned:

4. Date application approved: 10/16/2017
5. Number of units affected: 285 (of which 75% will be RAD and 25% will be Section 8*)
6. Coverage of action (select one)
 - Part of the development
 - Total development
7. Timeline for activity: Planned application (Letter of Interest) complete.
 - a. Actual or projected start date of activity: 2018
 - b. Projected end date of activity: 2023
8. Development description: Family development
9. Bedroom distribution:

1-BR	2-BR	3-BR	Total units
123	120	42	285

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition / Disposition Activity Description

- 1a. Development name: Amory
 - 1b. Development (project) number: MA002000245
 2. Activity type: Demolition:
Disposition:
 3. Application status (select one)
 - Approved: Commitment to enter into Housing Assistance Payments (CHAP) dated 10/16/2017
 - Submitted: Submitted 10/28/2016
 - Planned:
 4. Date application approved: 10/16/2017**
 5. Number of units affected: 199
 6. Coverage of action (select one)
 - Part of the development
 - Total development
 7. Timeline for activity:
 - a. Actual or projected start date of activity: late 2018
 - b. Projected end date of activity: TBD
- **Due to the high cost of needed capital improvements, BHA has received Disposition approval under Section 18 and is seeking Tenant Protection Vouchers to be project based in lieu of a RAD conversion.

Demolition / Disposition Activity Description*

- 1a. Development name: St. Botolph
- 1b. Development (project) number: MA002000253
2. Activity type: Demolition:

Supplement to HUD Form 50075-ST(1): Plan Elements

Disposition: X

3. Application status (select one)

Approved: Commitment to enter into Housing Assistance Payments (CHAP) dated 02/20/2018

Submitted: pending approval, Submitted October 23, 2017

Planned:

4. Date application approved:

5. Number of units affected: 132 (of which 75% will be RAD and 25% will be Section 8*)

6. Coverage of action (select one)

Part of the development

Total development

7. Timeline for activity:

a. Actual or projected start date of activity: 2019

b. Projected end date of activity: 2020

BHA plans to retain ownership and management.

8. Development description: Elderly/Disabled development

9. Bedroom distribution:

0-BR	1-BR	2-BR	Total units
82	47	3	132

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition / Disposition Activity Description

1a. Development name: Doris Bunte Apts. (Walnut Park)

1b. Development (project) number: MA002000242

2. Activity type: Demolition:

Disposition: X

3. Application status (select one)

Approved: Commitment to enter into Housing Assistance Payments (CHAP) dated 02/20/2018

Submitted:

Planned:

4. Date application approved:

5. Number of units affected: 165 (of which 75% will be RAD and 25% will be Section 8*)

6. Coverage of action (select one)

Part of the development

Total development

7. Timeline for activity:

a. Actual or projected start date of activity: 2019

b. Projected end date of activity: 2020

BHA plans to retain ownership and management.

Supplement to HUD Form 50075-ST(1): Plan Elements

81

8. Development description: Elderly/Disabled development

9. Bedroom distribution:

0-BR	1-BR	2-BR	Total units
106	51	8	165

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition / Disposition Activity Description*

1a. Development name: Ausonia

1b. Development (project) number: MA002000261

2. Activity type: Demolition: ___

Disposition: X

3. Application status (select one)

Approved: Commitment to enter into Housing Assistance Payments (CHAP) dated 02/20/2018

Submitted:

Planned:

4. Date application approved:

5. Number of units affected: 100 (of which 75% will be RAD and 25% will be Section 8*)

6. Coverage of action (select one)

Part of the development

X Total development

7. Timeline for activity:

a. Actual or projected start date of activity: 2019

b. Projected end date of activity: 2020

BHA plans to retain ownership and management.

8. Development description: Elderly/Disabled development

9. Bedroom distribution:

1-BR	2-BR	Total units
93	7	100

*BHA will blend Section 18 and RAD pursuant to PIH Notice 2018-04.

Demolition / Disposition Activity Description

1a. Development name: Anne M. Lynch Homes at Old Colony

1b. Development (project) number: MA002000124

2. Activity type: Demolition: ___

Disposition: X

3. Application status (select one)

Supplement to HUD Form 50075-ST(1): Plan Elements

82

Approved: X Commitment to enter into Housing Assistance Payments (CHAP) dated 02/22/2018 (amended 05/07/2018)

Submitted:

Planned:

4. Date application approved:

5. Number of units affected: 28

6. Coverage of action (select one)

Part of the development

Total development

7. Timeline for activity:

c. Actual or projected start date of activity: 2019

d. Projected end date of activity: 2021

8. Development description: Family development

9. Bedroom distribution:

1-BR	2-BR	3-BR	Total units
13	11	4	28

The RAD conversion of 28 units will be completed in the context of a larger mixed-finance redevelopment of Anne M. Lynch Homes at Old Colony Phase Three.

Demolition / Disposition Activity Description

1a. Development name: Long Glen Apartments

1b. Development (project) number: MA002002119

2. Activity type: Demolition:

Disposition: —Long Glen is a mixed-finance site that is not currently owned by BHA

3. Application status (select one)

Approved:

Submitted: X pending approval, Submitted October 23, 2017

Planned:

4. Date application approved:

5. Number of units affected: 34

6. Coverage of action (select one)

Part of the development—all 34 public housing units

Total development

7. Timeline for activity:

e. Actual or projected start date of activity: 2019

f. Projected end date of activity: 2021

Long Glen is an existing mixed-finance development that is not currently owned by BHA. There are 34 public housing units plus 25 non-public-housing units at the property. All 34 public housing units will convert to RAD.

Supplement to HUD Form 50075-ST(1): Plan Elements

83

8. Development description: Family development

9. Bedroom distribution:

0-BR	1-BR	2-BR	3-BR	Total units
10	14	9	2	34

Demolition / Disposition Activity Description

1a. Development name: Heritage

1b. Development (project) number: MA002002141

2. Activity type: Demolition: ___

Disposition: Heritage is a mixed finance site that is currently owned by an instrument of the BHA – Heritage Housing Corporation

3. Application status (select one)

Approved:

Submitted: pending approval, Submitted September 4, 2018

Planned:

4. Date application approved:

5. Number of units affected: 31

6. Coverage of action (select one)

Part of the development—all 31 public housing units

Total development

7. Timeline for activity:

e. Actual or projected start date of activity: 2019

f. Projected end date of activity: 2021

Heritage is an existing mixed-finance development that is currently owned by an instrument of the BHA – Heritage Housing Corporation. There are 31 public housing units plus 265 non-ACC units at the property. All 31 public housing units will convert to RAD.

8. Development description: Family development

9. Bedroom distribution:

0-BR	1-BR	2-BR	3-BR	Total units
22	3	6	0	31

Demolition / Disposition Activity Description

1a. Development name: Lower Mills

1b. Development (project) number: MA002002142

2. Activity type: Demolition: ___

Disposition: Lower Mills is a mixed finance site that is currently owned by an instrument of the BHA – Lower Mills Housing Corporation.

3. Application status (select one)

Approved:

Submitted: pending approval, Submitted September 4, 2018

Supplement to HUD Form 50075-ST(1): Plan Elements

84

Planned:

4. Date application approved:

5. Number of units affected: 19

6. Coverage of action (select one)

Part of the development—all 19 public housing units

Total development

7. Timeline for activity:

e. Actual or projected start date of activity: 2019

f. Projected end date of activity: 2021

Lower Mills is an existing mixed-finance development that is currently owned by an instrument of the BHA – Lower Mills Housing Corporation. There are 19 public housing units plus 159 non-ACC units at the property. All 19 public housing units will convert to RAD.

8. Development description: Elderly/Disabled development

9. Bedroom distribution:

0-BR	1-BR	2-BR	3-BR	Total units
9	8	2	0	19

Demolition / Disposition Activity Description

1a. Development name: Mission Main (Phase 1,2,3)

1b. Development (project) number: MA002002114, MA002002117, MA002002118

2. Activity type: Demolition:

Disposition: - Mission Main is a mixed finance site that is not currently owned by the BHA.

3. Application status (select one)

Approved:

Submitted: pending approval, Submitted September 4, 2018

Planned:

4. Date application approved:

5. Number of units affected: 445

6. Coverage of action (select one)

Part of the development—all 445 public housing units

Total development

7. Timeline for activity:

e. Actual or projected start date of activity: 2019

f. Projected end date of activity: 2021

Mission Main is an existing mixed-finance development that is not currently owned by the BHA. There are 445 public housing units plus 90 non-ACC units at the property. All 445 public housing units will convert to RAD.

8. Development description: Family development

9. Bedroom distribution:

0-BR	1-BR	2-BR	3-BR	4-BR	5+-BR	Total units
0	120	150	125	48	2	445

Demolition / Disposition Activity Description

- 1a. Development name: Eva White
 1b. Development (project) number: MA002000241
 2. Activity type: Demolition: ___
 Disposition: X
 3. Application status (select one)
 Approved:
 Submitted:
 Planned: X
 4. Date application approved: N/A
 5. Number of units affected: 102
 6. Coverage of action (select one)
 Part of the development
 Total development
 7. Timeline for activity: TBD
 e. Actual or projected start date of activity: TBD
 f. Projected end date of activity: TBD
 8. Development description: Elderly/Disabled development
 9. Bedroom distribution:

0-BR	1-BR	2-BR
34	57	11

Demolition/Disposition Activity Description*

- 1a. Development Name: Malone
 1b. Development (project) number: MA00200290
 2. Activity type: Demolition:
 Disposition: X
 3. Application Status (select one)
 Approved:
 Submitted:
 Planned: X
 4. Date application approved: N/A
 5. Number of units affected: 102
 6. Coverage of action (select one):
 Part of the Development:
 Total Development: X
 7. Timeline for activity: TBD
 e. Actual or projected start date of activity: TBD

Supplement to HUD Form 50075-ST(1): Plan Elements

- f. Projected end date of activity: TBD
- 8. Development description: Elderly/Disabled development
- 9. Bedroom distribution:

1-BR	2-BR
101	1

Demolition/Disposition Activity Description*

- 1a. Development Name: West Ninth
- 1b. Development (project) number: MA00200236
- 2. Activity type: Demolition:
Disposition: X
- 3. Application Status (select one)
Approved:
Submitted:
Planned: X
- 4. Date application approved: N/A
- 5. Number of units affected: 84
- 6. Coverage of action (select one):
Part of the Development:
Total Development: X
- 7. Timeline for activity: TBD
 - e. Actual or projected start date of activity: TBD
 - f. Projected end date of activity: TBD
- 8. Development description: Elderly/Disabled development
- 9. Bedroom distribution:

1-BR	2-BR
76	8

Demolition/Disposition Activity Description*

- 1a. Development Name: Annapolis
- 1b. Development (project) number: MA00200227
- 2. Activity type: Demolition:
Disposition: X
- 3. Application Status (select one)
Approved:
Submitted:
Planned Application: X
- 4. Date application approved: N/A
- 5. Number of units affected: 56

- 6. Coverage of action (select one):
 Part of the Development:
 Total Development: X
- 7. Timeline for activity: TBD
 - e. Actual or projected start date of activity: TBD
 - f. Projected end date of activity: TBD
- 8. Development description: Elderly/Disabled development
- 9. Bedroom distribution:

1-BR	2-BR
50	6

In addition to the RAD activities listed above, please note the following updates:

- 1. HUD had received a RAD award for a portion of Whittier Street in 2016. Subsequently BHA received a Choice Neighborhoods Implementation grant for Whittier. Follow the CNI grant award, BHA notified HUD that we would not be pursuing a RAD conversion at Whittier any further. The CNI redevelopment of Whittier will not include any RAD units.
- 2. As part of the four RAD applications submitted by BHA on 10/23/2017, BHA requested a “portfolio award” of RAD that would permit BHA to pursue RAD for an additional four properties in the future. No final decisions have been made regarding the future four sites, but for the purposes of requesting the portfolio award BHA did identify the following four sites as possible candidates: Eva White (MA002000241)—102 units; Malone Apartments (MA002000290)—102 units; Annapolis Street (MA002000227)—56 units; and West Ninth Street (MA002000236)—84 units. In each case, BHA may pursue blending RAD and Section 18 pursuant to PIH Notice 2018-04.

Resident Rights, Participation, Waiting List and Grievance Procedures

A. PBV Resident Rights and Participation.

- 1. **No Rescreening of Tenants upon Conversion.** Pursuant to the RAD Statute, at conversion, current households cannot be excluded from occupancy at the Covered Project based on any rescreening, income eligibility, or income targeting. With respect to occupancy in the Covered Project, current households in the Converting Project will be grandfathered for application of any eligibility criteria to conditions that occurred prior to conversion but will be subject to any ongoing eligibility requirements for

actions that occur after conversion.[§] Post-conversion, the tenure of all residents of the Covered Project is protected pursuant to PBV requirements regarding continued occupancy unless explicitly modified in this Notice (e.g., rent phase-in provisions). 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 of tenants for initial occupancy, will not apply for current households. Once the grandfathered household moves out, the unit must be leased to an eligible family. MTW agencies may not alter this requirement. Further, so as to facilitate the right to return to the assisted property, this provision shall apply to current public housing residents of the Converting Project that will reside in non-RAD PBV units or non-RAD PBRA units placed in a project that contain RAD PBV units or RAD PBRA units. Such families and such contract units will otherwise be subject to all requirements of the applicable program, specifically 24 CFR § 983 for non-RAD PBV units and the PBRA requirements governing the applicable contract for non-RAD PBRA units.**

2. **Right to Return.** See section 1.4.A.5(ii) and the RAD Fair Housing, Civil Rights, and Relocation Notice regarding a resident's right to return.
3. **Renewal of Lease.** Since publication of the PIH Notice 2012-32 Rev 1, the regulations under 24 CFR part 983 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 or 5 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

[§] These protections (as well as all protections in this Notice for current households) also apply when a household is relocated to facilitate new construction or repairs following conversion and subsequently returns to the Covered Project.

^{**} For non-RAD PBV households, applicable program requirements includes the requirement that any admission to the 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.

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.

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 “Calculated PBV 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 TTP or flat rent and the Calculated PBV TTP
- Year 2: Year 2 Annual Recertification (AR) and any Interim Recertification (IR) prior to Year 3 AR – 50% of difference between most recently paid TTP and the Calculated PBV TTP
- Year 3: Year 3 AR and all subsequent recertifications – Full Calculated PBV TTP ††

Five Year Phase in:

- Year 1: Any recertification (interim or annual) performed prior to the second annual recertification after conversion – 20% of difference between most recently paid TTP or flat rent and the Calculated PBV TTP
- Year 2: Year 2 AR and any IR prior to Year 3 AR – 25% of difference between most recently paid TTP and the Calculated PBV TTP

†† For example, where a resident’s most recently paid TTP is \$100, but the Calculated PBV TTP is \$200 and remains \$200 for the period of the resident’s occupancy, (i.e. no changes in income) the resident would continue to pay the same rent and utilities for which it was responsible prior to conversion. At the first recertification following conversion, the resident’s contribution would increase by 33% of \$100 to \$133. At the second AR, the resident’s contribution would increase by 50% of the \$66 differential to the standard TTP, increasing to \$166. At the third AR, the resident’s contribution would increase to \$200 and the resident would continue to pay the Calculated PBV TTP for the duration of their tenancy.

- Year 3: Year 3 AR and any IR prior to Year 4 AR – 33% of difference between most recently paid TTP and the Calculated PBV TTP
- Year 4: Year 4 AR and any IR prior to Year 5 AR – 50% of difference between most recently paid TTP and the Calculated PBV TTP
- Year 5 AR and all subsequent recertifications – Full Calculated PBV TTP

Please Note: In either the three year phase-in or the five-year phase-in, once the Calculated PBV 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 must also implement a three or five-year phase-in for impacted residents, but may alter the terms above as long as it establishes a written policy setting forth the alternative terms.

5. Family Self Sufficiency (FSS) and Resident Opportunities and Self Sufficiency Service Coordinator (ROSS-SC) programs. Public Housing residents that are currently FSS participants will continue to be eligible for FSS once their housing is converted under RAD. The PHA may continue to use any FSS funds already awarded to serve those FSS participants who live in units converted by RAD. At the completion of the FSS grant, PHAs should follow the normal closeout procedures outlined in the grant agreement. If the PHA continues to run an FSS program that serves PH and/or HCV participants, the PHA will continue to be eligible (subject to NOFA requirements) to apply for FSS funding and may use that funding to serve PH, HCV and/or PBRA participants in its FSS program. 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 subsequent Appropriation Acts), 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.## 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.

For information on FSS PIC reporting requirements for RAD conversions, see Notice PIH 2016-08 at <http://portal.hud.gov/hudportal/documents/huddoc?id=pih2016-08.pdf>.

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. At the completion of the ROSS-SC grant, PHAs should follow the normal closeout procedures outlined in the grant agreement. Please note that ROSS-SC grantees may be a non-profit or local Resident Association and this consequence of a RAD conversion may impact those entities.

- 6. Resident Participation and Funding.** In accordance with Attachment 1B, residents of Covered Projects with assistance converted to PBV 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. Termination Notification.** 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

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.

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 be :

- a. A reasonable period of time, but not to exceed 30 days:
 - i. If the health or safety of other tenants, Project Owner 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. Not less than 14 days in the case of nonpayment of rent; and
 - c. Not less than 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 resident 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 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),^{§§} 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).

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

1. **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 24 CFR § 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 that move into the property following conversion or tenants who at one time received the EID but are not receiving the EID exclusion at the time of conversion due to loss of employment) is covered by this waiver.

2. **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 relocation 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.

- 3. When Total Tenant Payment Exceeds Gross Rent.** Under normal PBV rules, the PHA may select an occupied unit to be included under the PBV HAP Contract only if the unit's occupants are eligible for housing assistance payments (24 CFR § 983.53(c)). 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 result in a family's TTP equaling or exceeding the gross rent for the unit, for residents living in the Converting Project prior to conversion and who will return to the Covered Project after 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 the Gross Rent. Further, HUD is establishing the alternative requirement that until such time that the family's TTP falls below the gross rent, the rent to the owner for the unit will equal the lesser of (a) the family's TTP, less the Utility Allowance, or (b) any applicable maximum rent under LIHTC regulations. When the family's TTP falls below the gross rent, normal PBV rules shall apply. As necessary to implement this alternative provision, HUD is waiving 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.*** 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. 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

*** 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.

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. 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.

- 4. Under-Occupied Unit.** If a family is in an under-occupied unit under 24 CFR § 983.260 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 § 983.260 is waived. MTW agencies may not modify this requirement.

B. PBV: Other Miscellaneous Provisions

- 1. Access to Records, Including Requests for Information Related to Evaluation of Demonstration.** PHAs and the Project Owner must cooperate with 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 Owner must submit to the administering PHA and the PHA's Board must approve the operating budget for the Covered Project annually in accordance with HUD requirements.^{†††}
- 3. Davis-Bacon Act and Section 3 of the Housing and Urban Development Act of 1968 (Section 3).** This section has been moved to 1.4.A.13 and 1.4.A.14.

^{†††} 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 monitoring and evaluation, given that PBV projects do not submit annual financial statements to HUD/REAC.

- 4. Establishment of Waiting List.** 24 CFR § 983.251 sets out PBV program requirements related to establishing and maintaining a voucher-wide, PBV program-wide, or site-based waiting list from which residents for the Covered Project will be admitted. These provisions will apply unless the project is covered by a remedial order or agreement that specifies the type of waiting list and other waiting list policies. 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.
 - ii. Transferring an existing site-based waiting list to a PBV program-wide or HCV program-wide waiting list.
 - iii. Transferring an existing community-wide public housing waiting list to a PBV program-wide or HCV program-wide waiting list, an option particularly relevant for PHAs converting their entire portfolio under RAD.
 - iv. Informing applicants on a community-wide public housing waiting list how to transfer their application to one or more newly created site-based waiting lists.

For any applicants on the public housing waiting list that are likely to be ineligible for admission to a Covered Project converting to PBV because the household's TTP is likely to exceed the RAD gross rent, the PHA shall consider transferring such household, consistent with program requirements for administration of waiting lists, to the PHA's remaining public housing waiting list(s) or to another voucher waiting list, in addition to transferring such household to the waiting list for the Covered Project.

To the extent any wait list relies on the date and time of application, the applicants shall have priority on the wait list(s) to which their application was transferred in accordance with the date and time of their application to the original waiting list.

If the PHA is transferring assistance to another neighborhood and, as a result of the transfer of the waiting list, the applicant would only be eligible for a unit in a location which is materially different from the location to which the applicant applied, the PHA must notify applicants on the wait-list of the transfer of assistance, and on how they can apply for residency at other sites.

If using a site-based waiting list, PHAs shall establish a waiting list in accordance with 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 Covered Project's initial waiting list. In all 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. 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 with the obligation to provide meaningful access for persons with limited English proficiency (LEP).^{##}

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 Covered Project in accordance with 24 CFR § 983.251(c).

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.8.

^{##} 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.

7. **Future Refinancing.** Project Owners must receive HUD approval for any refinancing or restructuring of secured debt during the HAP Contract term to ensure the financing is consistent with long-term preservation of the Covered Project. With respect to any financing contemplated at the time of conversion (including any permanent financing which is a conversion or take-out of construction financing), such consent may be evidenced through the RCC.

8. **Administrative Fees for Public Housing Conversions During the Year of Conversion.** For the remainder of the Calendar Year in which the HAP Contract becomes effective (i.e., the “year of conversion”), 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 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 HAP 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.

PHAs operating HCV program typically receive 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 Work Responsibility Act of 1998” and 24 CFR § 982.152(b). During the year of conversion mentioned in the preceding paragraph, these provisions are waived. PHAs will not receive Section 8 administrative fees for PBV RAD units during the year of conversion.

After the year of conversion, 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 tenant-based 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) of the Act and 24 CFR § 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 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.

A. PBRA Resident Rights and Participation.

- 1. No Rescreening of Tenants upon Conversion.** Pursuant to the RAD Statute, at conversion, current households cannot be excluded from occupancy at the Covered Project based on any rescreening, income eligibility, or income targeting. With respect to occupancy in the Covered Project, current households in the Converting Project will be grandfathered for application of any eligibility criteria to conditions that occurred prior to conversion but will be subject to any ongoing eligibility requirements for actions that occur after conversion.^{§§§} Post-conversion, the tenure of all residents of the Covered Project is protected pursuant to PBRA requirements regarding continued occupancy unless explicitly modified in this Notice (e.g., rent phase-in provisions). 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, the first clause of section 8(c)(4) of the Act and 24 CFR § 880.603(b), concerning determination of eligibility and selection of tenants for initial occupancy, will not apply for current households. Once the grandfathered household moves out, the unit must be leased to an eligible family. Further, so as to facilitate the right to return to the assisted property, this provision shall apply to current public housing residents of the Converting Project that will reside in non-RAD PBV units or non-RAD PBRA units placed in a project that contain RAD PBV units or RAD PBRA units. Such families and such contract units will otherwise be subject to all requirements of the applicable program, specifically 24 CFR § 983 for non-RAD PBV units and the PBRA requirements governing the applicable contract for non-RAD PBRA units.^{****}

- 2. Right to Return.** See section 1.4.A.5(ii) and the RAD Fair Housing, Civil Rights, and Relocation Notice regarding a resident's right to return.

- 3. Phase-in of Tenant Rent Increases.** If a resident'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 or 5 years. Eligibility for the phase-in is to be determined at the Initial Certification which occurs at the time the household is converted to PBRA. A phase-in must not be applied after the household's Initial Certification. To implement the phase-

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

^{****} For non-RAD PBV households, applicable program requirements includes the requirement that any admission to the 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.

in, HUD is specifying alternative requirements for section 3(a)(1) of the Act, as well as 24 CFR § 880.201 (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.

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 “Calculated Multifamily TTP” refers to the TTP calculated in accordance with regulations at 24 CFR § 5.628 (not capped at Gross Rent) and the “most recently paid TTP” refers to the TTP recorded on the family’s most recent HUD Form 50059. If a family in a project converting from Public Housing to PBRA 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 TTP or flat rent and the Calculated Multifamily TTP
- Year 2: Year 2 Annual Recertification (AR) and any Interim Recertification (IR) in prior to Year 3 AR – 50% of difference between most recently paid TTP and Calculated Multifamily TTP
- Year 3: Year 3 AR and all subsequent recertifications – Year 3 AR and any IR in Year 3: Full Calculated Multifamily TTP⁺⁺⁺⁺

⁺⁺⁺⁺ For example, where a resident’s most recently paid TTP is \$100, but the Calculated PBV TTP is \$200 and remains \$200 for the period of the resident’s occupancy, (i.e. no changes in income) the resident would continue to pay the same rent and utilities for which it was responsible prior to conversion. At the first recertification following conversion, the resident’s contribution would increase by 33% of \$100 to \$133. At the second AR, the resident’s contribution would increase by 50% of the \$66 differential to the standard TPP, increasing to \$166. At the third AR, the resident’s contribution would increase to \$200 and the resident would continue to pay the Calculated PBV TTP for the duration of their tenancy.

Five Year Phase-in

- Year 1: Any recertification (interim or annual) performed prior to the second annual recertification after conversion – 20% of difference between most recently paid TTP or flat rent and the Calculated Multifamily TTP
- Year 2: Year 2 AR and any IR prior to Year 3 AR – 25% of difference between most recently paid TTP and Calculated Multifamily TTP
- Year 3: Year 3 AR and any IR prior to Year 4 AR – 33% of difference between most recently paid TTP and Calculated Multifamily TTP
- Year 4: Year 4 AR and any IR prior to Year 5 AR – 50% of difference between most recently paid TTP and Calculated Multifamily TTP
- Year 5 AR and all subsequent recertifications – Full Calculated Multifamily TTP

Please Note: In either the three year phase-in or the five-year phase-in, once Calculated Multifamily TTP is equal to or less than the previous TTP, the phase-in ends and tenants will pay full Calculated Multifamily TTP from that point forward

- 4. Family Self-Sufficiency (FSS) and Resident Opportunities and Self Sufficiency Service Coordinator (ROSS-SC) programs.** Public Housing residents that are currently FSS participants will continue to be eligible for FSS once their housing is converted under RAD. All Project Owners will be required to administer the FSS program or partner with another agency to administer the FSS program in accordance with the requirements of 24 CFR part 984, the participants' contracts of participation, and future guidance published by HUD. The PHA may continue to use any FSS funds already awarded to serve FSS participants in Covered Projects. At the completion of the FSS grant, grantees should follow the normal closeout procedures outlined in the grant agreement. Through waiver in this Notice, FSS funds awarded in FY14 and prior FSS funds may be used to continue to serve FSS participants living in units converted under RAD to PBRA. Pursuant to the FY 2015 Appropriations Act, any FSS funds awarded in FY 2015 (and thereafter if the provision is extended), may be used to also serve any other PBRA resident (regardless of whether the resident is in a Covered Project).

Project Owners will be allowed to use any funds already granted for FSS coordinator salaries until such funds are expended. All Project Owners will be required to provide both service coordinators and payments to escrow until the end of the Contract of Participation for each resident. If the Project Owner is a PHA that continues to run an FSS program that serves public housing and/or HCV FSS participants, the PHA will continue to be eligible (subject to NOFA requirements) to apply for FSS funding and may use that funding to serve public housing, HCV and/or PBRA FSS participants. However, if the PHA no longer has a public housing or HCV program, the Project Owner is not eligible to apply for FSS funding. The owner is not required to enroll new participants, but may choose to do so in accordance with Housing Notice 2016-08

Upon conversion, funds escrowed under the public housing program for FSS participants shall be transferred into the PBRA escrow account and be considered PBRA funds, thus reverting to PBRA if forfeited by the FSS participant.

To ensure that HAP payments are processed correctly, and until TRACS is modified, the Project Owner must notify MF_FSS@hud.gov that there are current FSS participants residing in the Covered Project. If a Project Owner of a Covered Project refuses to continue a FSS program, the PHA and the Project Owner will enter into an arrangement allowing the PHA to continue to operate the FSS program until all converted PBRA FSS participants have completed their Contracts according to 24 CFR § 984.303.

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, as ROSS-SC, by statute, can serve only public housing residents. At the completion of the ROSS-SC grant, grantees should follow the normal closeout procedures outlined in the grant agreement. Please note that ROSS-SC grantees may be a non-profits or local Resident Association and this consequence of a RAD conversion may impact those entities.

- 5. Resident Participation and Funding.** Residents of Covered Projects with assistance converted 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, in accordance with Attachment 1B, residents will be eligible for resident participation funding.

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6. Resident Procedural Rights. The information provided below must be included as part of the House Rules for the associated project and the House Rules must be furnished to HUD as part of the Financing Plan submission. See Attachment 1E for a sample Addendum to the House Rules.

i. Termination Notification. HUD is incorporating additional termination notification requirements to comply with section 6 of the Act for public housing projects converting assistance under RAD, that supplement notification requirements in regulations at 24 CFR § 880.607 and the Multifamily HUD Model Lease.

a. *Termination of Tenancy and Assistance.* The termination procedure for RAD conversions to PBRA will additionally require that Project Owners provide adequate written notice of termination of the lease which shall be:

- i. A reasonable period of time, but not to exceed 30 days:
 - o If the health or safety of other tenants, Project Owner employees, or persons residing in the immediate vicinity of the premises is threatened; or
 - o In the event of any drug-related or violent criminal activity or any felony conviction;
- ii. Not less than 14 days in the case of nonpayment of rent; and
- iii. Not less than 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.

b. *Termination of Assistance.* In all other cases, the requirements at 24 CFR § 880.603, the Multifamily HUD Model Lease, and any other HUD multifamily administrative guidance shall apply.

ii. Grievance Process. Pursuant to requirements in the RAD Statute, HUD is establishing additional resident procedural rights to comply with section 6 of the Act. In addition to program rules that require that tenants are given notice of covered actions under 24 CFR part 245 (including increases in rent, conversions of a project from project-paid utilities to tenant-paid utilities, or a reduction in tenant paid utility allowances), HUD requires that:

- a. Residents be provided with notice of the specific grounds of the Project Owner's proposed adverse action, as well as their right to an informal hearing with the Project Owner;
- b. Residents have an opportunity for an informal hearing with an impartial member of the Project Owner's staff within a reasonable period of time;
- c. Residents have the opportunity to be represented by another person of their choice, to ask questions of witnesses, have others make statements at the hearing, and to examine any regulations and any evidence relied upon by the Project Owner as the basis for the adverse action. With reasonable notice to the Project Owner, prior to hearing and at the residents' own cost, residents may copy any documents or records related to the proposed adverse action; and
- d. Project Owners provide the resident with a written decision within a reasonable period of time stating the grounds for the adverse action and the evidence the Project Owner relied on as the basis for the adverse action.

The Project Owner will be bound by decisions from these hearings, except if (x) the hearing concerns a matter that exceeds the authority of the impartial party conducting the hearing, or (y) the decision is contrary to HUD regulations or requirements, or otherwise contrary to federal, State, or local law. If the Project Owner determines that it is not bound by a hearing decision, the Project Owner must promptly notify the resident of this determination, and of the reasons for the determination.

- 7. 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 exclusion after conversion, in accordance with regulations at 24 CFR § 960.255. After conversion, no other tenants will be eligible to receive the EID. If a tenant receiving the EID exclusion undergoes a break in employment, ceases to use the EID exclusion, or the EID exclusion expires in accordance with 24 CFR § 960.255, the tenant will no longer receive the EID exclusion and the Owner will no longer be subject to the provisions of 24 CFR § 960.255. Furthermore, tenants whose EID ceases or expires after conversion shall not be subject to the rent phase-in provision, as described in Section 1.7.B.3; instead, the rent will automatically be adjusted to the appropriate rent level based upon tenant income at that time.

- 8. Jobs Plus.** Jobs Plus grantees awarded FY14 and future funds that convert the Jobs Plus target project(s) under RAD will be able to finish out their Jobs Plus grant at that site unless significant relocation 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. If the program is continued, the Project Owner must agree to continue to implement the program according to HUD's program requirements.
- 9. When Total Tenant Payment Exceeds Gross Rent.** Under the PBRA program, assisted families typically pay 30% of adjusted gross income toward rent and utilities, referred to as TTP. Under normal PBRA rules, a Project Owner must process a termination of assistance pursuant to section 8-5 C. of Housing Handbook 4350.3, REV-1 when 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)). In addition, section 8-6 A.1 provides that, when terminating a tenant's assistance, the owner is to increase the tenant rent to the contract rent (assuming that the tenant does not receive the benefit of any other type of subsidy).

For residents living in the Converting Project on the date of conversion and all new admissions to the Covered Project thereafter, when TTP equals or exceeds the contract rent plus any utility allowance, the Project Owner must charge a tenant rent equal to the lesser of (a) TTP (which is not capped at gross rent), less the utility allowance in the contract, or (b) any applicable maximum rent allowable under LIHTC regulations.^{###} To this end, HUD is waiving sections 8-5 C. and 8-6 A. 1. of Housing Handbook 4350.3, REV-1. In such cases, the tenant will still be considered a Section 8 tenant and will still have the rights and be subject to the requirements of Section 8 tenants. Tenants will retain all of the rights under the Model Lease, including the right to occupy the unit, as well as those provided through this Notice, and tenants will still be subject to the requirements for Section 8 tenants, including the requirements concerning reexamination of family income and composition found in 24 CFR §§ 5.657 and 880.603(c). When TTP equals or exceeds Gross Rent, the excess rent collected by the owner is considered project funds and must be used for project purposes. Assistance may subsequently

^{###} 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. Accordingly, the Project Owner must charge this resident \$550, i.e., \$600 TTP, minus \$50 Utility Allowance.

be reinstated if the Tenant becomes eligible for assistance. In the event that the tenant moves out, the Project Owner must select an applicant from the waiting list who meets the applicable income limits for the project.

The Project Owner is not required to process these individuals through Multifamily Housing's Tenant Rental Assistance Certification System (TRACS) but may be required to do so in the future when a future revision of the TRACS can accept such certifications. All normal actions for the contract rent shall continue for these units, including application of the OCAF adjustment to the contract rent indicated in the HAP Contract—since the OCAF adjusted rent will still be in effect whenever the unit is occupied by a family eligible for rental assistance.

10. Under-occupied Units. If at the time of conversion, an eligible family assisted under the HAP Contract is occupying a unit that is larger than appropriate because of the family's composition, the family may remain in the 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 within a reasonable period of time. In order to allow the family to remain in the under-occupied unit until an appropriate sized unit becomes available in the Covered Project, HUD is waiving the portion of 24 CFR § 880.605 that assumes the unit has become under-occupied as the result of a change in family size.

B. PBRA: Other Miscellaneous Provisions.

- 1. Access to Records, Including Requests for Information Related to Evaluation of Demonstration.** PHAs and the Project Owner must cooperate with 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.
- 2. Davis-Bacon prevailing wages and Section 3 of the Housing and Urban Development Act of 1968 (Section 3).** This section has been moved to 1.4.A.13 and 1.4.A.14.
- 3. 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:

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- i. Transferring an existing site-based waiting list to a new site-based waiting list.
- ii. Transferring an existing site-based waiting list to a PBRA program-wide or HCV program-wide waiting list.
- iii. Transferring an existing community-wide public housing waiting list to a PBRA program-wide or HCV program-wide waiting list, an option particularly relevant for PHAs converting their entire portfolio under RAD.
- iv. Informing applicants on a community-wide public housing waiting list how to transfer their application to one or more newly created site-based waiting lists.

To the extent the wait list relies on the date and time of application, the applicants shall have priority on the wait list(s) to which their application was transferred in accordance with the date and time of their application to the original waiting list.

If the PHA is transferring assistance to another neighborhood and, as a result of the transfer of the waiting list, the applicant would only be eligible for a unit in a location which is materially different from the location to which the applicant applied, the PHA must notify applicants on the wait-list of the transfer of assistance, and on how they can apply for residency at other sites.

If using a site-based waiting list, PHAs shall establish a waiting list in accordance with 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 Covered Project's initial waiting list. In all 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. 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 with the obligation to provide meaningful access for persons with limited English proficiency (LEP).^{§§§§}

A Project Owner must maintain any site-based waiting list in accordance with all applicable civil rights and fair housing laws and regulations unless the project is covered by a remedial order or agreement that specifies the type of waiting list and other waiting list policies.

To implement this provision, HUD is specifying alternative requirements for 24 CFR § 880.603 regarding selection and admission of assisted tenants. However, after the initial waiting list has been established, the Project Owner shall administer its waiting list for the Covered Project in accordance with 24 CFR § 880.603.

- 4. 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 property of a project.
- 5. Choice-Mobility.** HUD seeks to provide all residents of Covered Projects with viable Choice-Mobility options. PHAs that are applying to convert the assistance of a project to PBRA are required to provide a Choice-Mobility option to residents of Covered Projects in accordance with the following:^{*****}
 - i. Resident Eligibility.** Residents have a right to move with tenant-based rental assistance (e.g., Housing Choice Voucher (HCV)) the later of:
(a) 24 months from date of execution of the HAP or (b) 24 months after the move-in date.
 - ii. Voucher Inventory Turnover Cap.** Recognizing the limitation on the availability of turnover vouchers from year to year, a voucher agency would not be required, in any year, to provide more than one-third of its turnover vouchers to the residents of Covered Projects. While a voucher agency is not required to establish a voucher inventory

^{§§§§} 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.

^{*****} The Choice-Mobility requirements that apply to covered PBRA projects differ from the requirements that apply to covered PBV projects.

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.

- iii. *Project Turnover Cap.* Also recognizing the limited availability of turnover vouchers and the importance of managing turnover in the best interests of the property, in any year, a PHA may limit the number of Choice-Mobility moves exercised by eligible households to 15 percent of the assisted units in the project. (For example, if the project has 100 assisted units, the PHA could limit the number of families exercising Choice-Mobility to 15 in any year, but not to less than 15.) While a voucher agency is not required to establish a project 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.

HUD's goal is to have all residents in the Demonstration offered a Choice-Mobility option within a reasonable time after conversion. However, as HUD recognizes that not all PHAs will have vouchers sufficient to support this effort, HUD will take the following actions:

- Provide voucher agencies that make such a commitment bonus points provided under the Section Eight Management Assessment Program (SEMAP) for deconcentration.^{††††}
- Grant a good-cause exemption from the Choice-Mobility requirement for no more than 10 percent of units in the Demonstration. HUD will consider requests for good-cause exemptions only from the following types of PHAs:
 - Public housing—only agencies, defined as agencies that own units under a public housing ACC, but do not administer, directly or through an affiliate, a Housing Choice Voucher program; or
 - Combined agencies that currently have more than one-third of their turnover vouchers set aside for veterans, as defined for the purpose of HUD-VASH, or homeless populations, as defined in 24 CFR § 91.5.^{‡‡‡‡} To be eligible for this exemption, the PHA's

^{††††} The sponsoring agency must commit to the full term of the initial HAP Contract, must undergo a significant amendment to its Annual Plan (no later than 60 days after execution of the project's CHAP), and must comply with section 8(o)(6)(A) relating to selection preferences. In order to implement this incentive, HUD is waiving provisions under 24 CFR § 985.3(h) to provide donating agencies with bonus points under the SEMAP for deconcentration.

^{‡‡‡‡} A veteran is, for the purpose of HUD-VASH, a person who served in the active military, naval, or air service, and who was discharged or released under conditions other than dishonorable and is eligible for Veterans Administration health care.

admission policies must have been formally approved by the PHA's board prior to the time of application.

- 6. Future Refinancing.** Project Owners must receive HUD approval for any refinancing or restructuring of secured debt during the HAP Contract term to ensure the financing is consistent with long-term preservation of the Covered Project. With respect to any financing contemplated at the time of conversion (including any permanent financing which is a conversion or take-out of construction financing), such consent may be evidenced through the RCC.
- 7. Submission of Year-End Financial Statements.** Projects converting assistance to PBRA must comply with 24 CFR part 5, subpart H, as amended, revised, or modified by HUD. §§§§§
- 8. Classification of Converting Projects as Pre-1981 Act Projects under Section 16(c) of the United States Housing Act of 1937.** For purposes of ensuring maximum flexibility in converting to PBRA, all projects converting to PBRA shall be treated as Pre-1981 Act Projects under Section 16(c) of the Act. Section 16(c)(1), which applies to pre-1981 Act projects, restricts occupancy by families that are other than very low-income to 25% of overall occupancy. Thus, Project Owners of projects converting to PBRA may admit applicants with incomes up to the low-income limit. HUD Headquarters tracks the 25% restriction on a nationwide basis. Project Owners of projects converting to PBRA do not need to request an exception to admit low-income families. In order to implement this provision, HUD is specifying alternative requirements for section 16(c)(2) of the Act and 24 CFR § 5.653(d)(2) to require Project Owners of projects converting to PBRA to adhere to the requirements of section 16(c)(1) of the Act and 24 CFR § 5.653(d)(1).
- 9. Owner-Adopted Preferences.** Project Owners may adopt a preference for elderly single persons pursuant to 24 CFR § 5.655(c)(5) and Housing Handbook 4350.3, Chapter 4, provided the adoption of such preference can be implemented consistent with the residents' right of return under this Notice. Project Owners who wish to adopt a preference for populations that are not identified in 24 CFR § 5.655(c)(5) (e.g., elderly families, near-elderly single persons, near-elderly families), may do so pursuant to Housing Notice 2013-

§§§§§ This provision is included to clarify existing requirements for PHAs that own PBRA-assisted projects through Single Asset Entities. Such owners are considered reporting entities under 24 CFR § 5.801 (a)(3) and (a)(4).

21 (July 25, 2013). A Project Owner may not adopt a preference that would have the purpose or effect of substantially delaying or denying the participation of other eligible families in the program on the basis of race, color, national origin, religion, sex, disability, or familial status, or would create or perpetuate segregation

20. Occupancy by Over-Income Families

BHA is including in its Admissions and Continued Occupancy Policy (ACOP) Section 9.2.1 a policy for over-income families.

21. Occupancy by Police Officers

See Admissions and Continued Occupancy Policy (ACOP) section 10.6. for policy on Occupancy by Police Officers. BHA doesn't have any units officially occupied by law enforcement officers as reported in PIC.

22. Non-Smoking Policies

NON-SMOKING POLICY from Section 18 of the BHA Public Housing Lease

A. Purpose of Non-Smoking Policy. The parties (BHA and the Tenant/Resident) desire to mitigate (i) the irritation and known health effects of secondhand smoke; (ii) the increased maintenance, cleaning and redecorating costs from smoking; (iii) the increased risk of fire from smoking; and (iv) the higher costs of fire insurance for a non-smoke-free building.

B. Definition of Smoking. The term “smoking” means inhaling, exhaling, breathing, or carrying or possessing any lighted cigarette, cigar, pipe or other tobacco product or similar lighted product in any manner or in any form.

C. Non-Smoking Area. Resident agrees and acknowledges that the premises to be occupied by Resident and members of Resident's household and any interior common areas, including but not limited to community rooms, community bathrooms, lobbies, reception areas, hallways, laundry rooms, stairways, offices and elevator, within all living units, and within a specified distance from building(s), as determined by the property manager in consultation with the residents, including entry ways, porches, balconies and patios have been designated as a Non-smoking living environment. Resident and members of Resident's household shall not smoke anywhere in said Non-Smoking Area, including in the unit rented by Resident, the building where Resident's dwelling is located, or in any of the common areas or adjoining grounds of such building including the steps, patios or yards, nor shall Resident permit any guests or visitors under the control of Resident to smoke in said Non-Smoking Area.

D. Resident to Promote Non-Smoking Policy and to Alert Landlord of Violations. Resident shall inform Resident's guests of the non-smoking policy. Further, Resident shall promptly give Landlord a written statement of any incident where tobacco smoke is migrating into the Resident's unit from sources outside of the Resident's unit.

E. Landlord to Promote Non-Smoking Policy. Landlord shall post no-smoking signs at entrances and exits, in common areas, and in conspicuous places adjoining the grounds of the Non-Smoking Area.

F. Landlord Not a Guarantor of Smoke-Free Environment. Resident acknowledges that Landlord's adoption of a non-smoking living environment does not make the Landlord or any of its managing agents the guarantor of Resident's health or of the non-smoking condition of the Resident's unit and the common areas. However, Landlord shall take reasonable steps to enforce the

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non-smoking terms of this leases and to make the Non- Smoking Area as smoke-free as is reasonably possible. Landlord is not required to take

steps in response to smoking unless Landlord knows of said smoking or has been given written notice of said smoking.

G. Effect of Breach and Right To Terminate Lease. A breach of this Section of the Lease shall give each party all the rights contained herein, as well as the rights otherwise contained in the Lease. A material or continuing breach of this Section shall be a material breach of the Lease and grounds for termination of the Lease by the Landlord. **Tenant acknowledges that the remedy for smoking within the apartment may be the assessment of a charge of up to two hundred-fifty dollars (\$250.00) for each smoking incident. Charges will be used by the BHA towards the costs of refurbishing the apartment.**

H. Disclaimer by Landlord. Resident acknowledges that Landlord's adoption of a non- smoking living environment, does not in any way change the standard of care that the Landlord or managing agent would have to a resident household to render buildings and premises designated as non-smoking any safer, more habitable, or improved in terms of air quality standards than any other rental premises. Landlord specifically disclaims any implied or express warranties that the building, common areas, or Resident's premises will have any higher or improved air quality standards than any other rental property. Landlord cannot and does not warrant or promise that the rental premises or common areas will be free from secondhand smoke. Resident acknowledges that Landlord's ability to police, monitor, or enforce the provisions of this Section is dependent in significant part on voluntary compliance by Resident and Resident's guests, as well as by other residents and guests in other parts of the Non-Smoking Area. Residents with respiratory ailments, allergies, or any other physical or mental condition relating to smoke are put on notice that Landlord does not assume any higher duty of care to enforce this Section than any other landlord obligation under the Lease.

23. Project-Based Vouchers

Project-based Vouchers: Boston Housing Authority Section 8 Project Based Voucher Program

Background

As a result of the Fiscal Year 2001 HUD Appropriations Act, regulations were issued incorporating the Project Based Assistance requirements into the merged voucher program. These regulations were originally published in the Federal Register on January 16, 2001 and permitted the BHA to enter into a housing assistance payments (HAP) contracts with otherwise qualified owners provided the HAP contracts were in congruence with the PHA Plan (see 42 U.S.C. 1437c-1, implemented at 24 CFR part 903.) HUD defines “consistency with the PHA Plan” as a demonstration by the PHA that circumstances exist that indicate that project basing of the units, rather than tenant-basing of the same subsidy assistance is an appropriate option. Subsequently, HUD promulgated the Project Based Voucher Program; Final Rule on October 13, 2005, incorporating therein the sum and substance of the January, 2001 Initial Guidance. The following discusses the BHA’s implementation of this important policy tool.

PHA Plan

HUD's initial guidance published January, 2001 and again incorporated into the October, 2005 final rule specifies that PHAs that wish to use the project-based voucher option must attach a statement to the PHA Plan template. 66 Fed. Reg. 3608.

___: The statement must include the projected number of project-based units and general locations, and

___: how project basing would be consistent with the PHA plan.

The Projected Number of Project Based Units

Under the Project Based Voucher (PBV) regulations, the BHA has the option to convert up to 20% of our tenant based voucher allocation to project based assistance. With the BHA’s present portfolio size of 14,558 tenant-based units, 20% would equate to 2912 units. By the end of BHA Fiscal Year 2019, the BHA anticipates that it will have 1740 units under contract in its PBV Program. In 2018 and 2019, BHA anticipates a number of PBV projects that will be excluded from the 20% threshold as they will result from Public Housing developments converted under HOTMA and through RAD.

The BHA may grant project base vouchers only if the contract is consistent with the goals of deconcentrating poverty and expanding housing and economic opportunities. Projects may not be sited in areas where the census data reflects a poverty rate of greater than 20% unless there is evidence that the project will

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further deconcentration goals. All of the BHA's Project Based Vouchers under lease have met HUD's requirements listed above regarding the location of projects.

Future Siting of Section 8 Based Voucher Projects: Strategic Investment

The PBV rules permit a PHA to give an award of PBV vouchers if a developer has successfully obtained financing from other competitive rounds; where an award of PBV assets was not contemplated. In the event that resources permit and an otherwise qualified project is presented, the BHA reserves the ability to review individual requests. All units must serve homeless households and/or elderly / disabled households.

Future PBV project sites should have strategic importance for the social or economic well-being of the community. This should be demonstrated both by an analysis of how the proposed project will meet a specific community need as well as by the level of public support for the project. By necessity, this will vary depending on the type of project being proposed. The following guidelines should be considered:

Construction type: New construction projects have the greatest physical impact on the surrounding community, and thus should provide a clear justification for the choice of location and how the project will impact (positively or negatively) the immediate surrounding neighborhood. Adaptive reuse projects should justify the impact of the converted use on the surrounding area. The rehabilitation of vacant/abandoned buildings should explain why the particular building(s) was selected and the impact its restoration will have on nearby properties and the neighborhood.

Preservation projects of occupied buildings generally may or may not have any impact on the surrounding neighborhood. Finally, larger projects of any type tend to have greater impacts than smaller projects.

Neighborhood needs: Neighborhood needs can be demonstrated in several ways. The most significant method, for example, is when the project is the outcome of a participatory neighborhood planning process that has identified the strategic importance of specific sites and buildings as part of a larger neighborhood development plan. A similar though less formal method is when a building or site has been identified by a community group as very important for redevelopment (e.g. perhaps it is a major eyesore at a key location) Neighborhood needs may also be supported by data that demonstrate there is a shortage of a particular housing type (e.g. units for single people, large families, etc.).

Citywide needs: If the project is intended to serve more of a citywide housing need -- for example, supportive housing for the disabled, elderly, veterans, and/or homeless -- the applicant should provide information supporting the need

for that housing and as well as the choice of location versus other possible locations.

Community support: Ideally, all projects will have already established firm community support. This is not always possible, however. The project should be able to demonstrate local neighborhood support and/or the support of citywide organizations, to the extent the project is serving a broader citywide need. If support has not been established at the time of application, the applicant must submit a plan for further outreach that is appropriate to the type of project being proposed. It is important for projects serving citywide needs to establish meaningful contact with local abutters and neighborhood organizations. It is also important to establish a greater level of support for projects that will have significant physical impacts (e.g. a large new construction project). Final funding commitments will be made only following successful completion of the outreach plan.

How Project Basing is Consistent with the PHA Plan: The BHA has elected to convert tenant-based assistance to project based assistance to encourage new construction and rehabilitation.

Project based housing provides long term assets which are dedicated to housing persons of low income, as well as special needs tenants. These units will not experience fluctuations in availability and price to which the general housing market is subject.

24. Units with Approved Vacancies for Modernization

See Admissions and Continued Occupancy Policy section 6.2.3 for policy on units with approved vacancies for modernization. BHA currently doesn't have any units officially offline as funded for modernization in PIC.

25. Other Capital Grant Programs

___: Yes X: No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?

If yes, list developments or activities below:

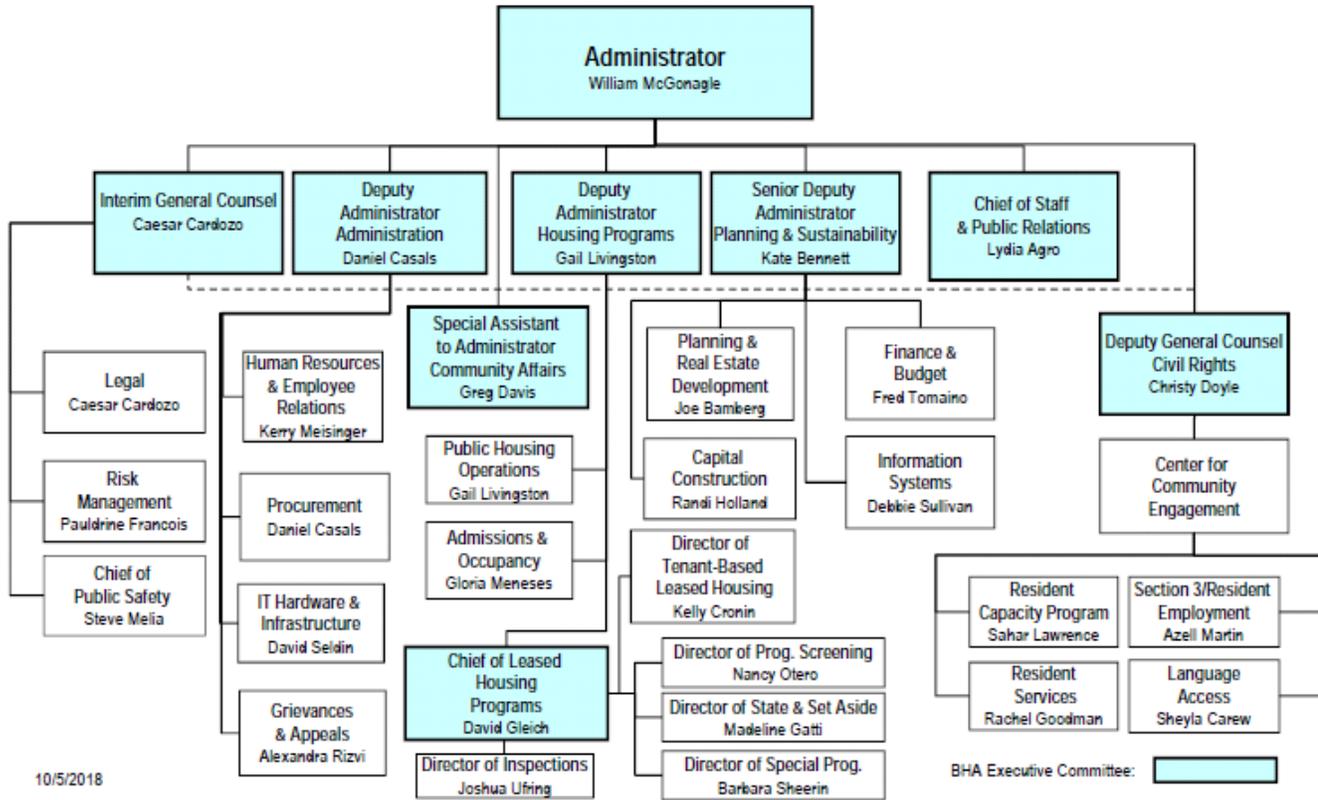
Replacement Housing Factor (RHF) Funding Plans are available for review in the BHA Real Estate Department. Funds from the current RHF grants have been used in the development of Washington Beech Phase 2 and are now being used in connection with Anne M. Lynch Homes at Old Colony Phase 3 redevelopment. RHF grant funding is as follows:

Increment	Grant Year	RHF Grant Number	Dollar Amount	Obligation/ Expenditure Status	Use
1	FFY 2012	MA-06-R002-501-12	\$1,232,435	Partially obligated and expended	Anne M. Lynch Homes at Old Colony Phase 3
2	FFY 2012	MA-06-R002-502-12	\$992,961	Washington Beech - expended / Anne M. Lynch Homes at Old Colony -to be obligated	Washington Beech Phase 2 / Anne M. Lynch Homes at Old Colony Phase 3
1	FFY 2013	MA-06-R002-501-13	\$733,139	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
2	FFY 2013	MA-06-R002-502-13	\$1,273,359	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
1	FFY 2014	MA-06-R002-501-14	\$231,469	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
2	FFY 2014	MA-06-R002-502-14	\$1,182,937	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
1	FFY 2015	MA-06-R002-501-15	\$230,515	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
2	FFY 2015	MA-06-R002-502-15	\$828,377	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
1	FFY 2016	MA06-R002-501-16	\$235,125	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
2	FFY 2016	MA06-R002-502-16	\$225,692	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3
2*	FFY 2017	MA06-R002-502-17	\$227,036	Unobligated	Anne M. Lynch Homes at Old Colony Phase 3

*There was no increment 1 grant in 2017.

As of 9/30/18

Boston Housing Authority



The Executive Committee is made up of top BHA officials appointed by the Administrator. The Committee meets regularly to discuss BHA business operations and strategic initiatives.