



Moving Forward Annual Plan Fiscal Year 2010-2011

Housing Authority of the City of Charlotte
1301 South Boulevard
Charlotte, North Carolina 28203
Revised 04/06/10



Charlotte Housing Authority

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INTRODUCTION

The Housing Authority of the City of Charlotte (CHA) was created in June 1939, with the intent to provide temporary housing for families unable to obtain housing due to a changing economic system. During 70 years of operation, the agency has evolved from being the housing of last choice; traditionally recognized for standard, sanitary and safe dwelling accommodations. The present day CHA is the largest provider of quality, attractive, affordable housing for very low to low income families in Charlotte/Mecklenburg.

Based on its reputation as a high performing agency with leadership abilities, CHA was selected as one of 30 agencies to participate in the Department of Housing and Urban Development's (HUD's) Moving To Work (MTW) Demonstration Program. CHA executed an amended and restated MTW agreement in April 2008 which extends through 2018. Through the flexibility of the MTW Demonstration Program, CHA is able to develop policy and housing strategies to address local challenges, receive exemptions from specified federal regulations and combine funding awarded by HUD into one single fund budget with full flexibility. CHA has branded the local effort as Moving Forward, which reflects a combination of shared intent, forward movement, and the image of affordable housing as a safety net and platform for rebuilding lives.

Charlotte has initiated a number of activities that meet the federal statutory objectives: **1)** reduce cost and achieve greater cost effectiveness in Federal expenditures; **2)** give incentives to families with children whose heads of household are either working, seeking work, or are participating in job training, educational or other programs that assist in obtaining employment and becoming economically self-sufficient; and **3)** increase housing choices for low-income families. There are examples on the pages following this introduction that serve as an overview of the local challenges CHA is facing, as well as the activities designed and the approaches the agency is in the process of testing to determine what is effective or successful and what is not.

The purpose of the Annual Plan is to provide local stakeholders and HUD with a clear understanding of the Agency's activities for the coming fiscal year. CHA's vision *Creating Community, Empowering Families and Building Partnerships*, as well as the new agency mission **"To develop, lead and execute community-wide strategies that meet the broad range of housing needs for families who cannot otherwise attain conventional housing"** set the framework for our corporate objectives and strategic goals.

Strategic Goals

- Lead the development of collaborative relationships for affordable housing solutions to a broad continuum of stakeholders.
- Maximize the economic, physical, and social value of our real estate portfolio.
- Ensure that the Authority attains long-term financial viability.
- Provide the highest quality most cost effective real estate management services, which exceed HUD and industry standards.
- Create an environment that facilitates the development of client families to reach their highest potential.

In this section CHA summarizes the new and ongoing activities for this program. The divisional Moving Forward goals and objectives are listed in the long-term plan section. The use of MTW flexibility to initiate the Moving Forward activities will aid CHA in accomplishing the projects below which constitute the agency wide Moving Forward goals and objectives for the year:

- ❖ **Continue the Social Marketing/Educational Outreach Campaign on Moving Forward.** CHA launched a social marketing campaign in March 2009 to introduce the Moving Forward initiative to the Charlotte area and to communicate the importance of affordable housing for the low income families CHA serves. The initiative has far-reaching implications for everyone who lives in the community and requires informing all of our constituents, including the general public.

The campaign, implemented over a six-week period, utilized diverse media channels, including television, radio, outdoor billboards and print. In addition to informing the public about the Authority's Moving Forward efforts, the goal of the campaign was to build public support for the initiative by changing damaging or unfair misperceptions about residents of public housing and participants in the Section 8 program.

- ❖ **Redevelopment of Boulevard Homes:** CHA applied for a HOPE VI grant to redevelop Boulevard Homes. The envisioned redevelopment represents a unique partnership among CHA, Charlotte-Mecklenburg Schools (CMS), the City of Charlotte, Mecklenburg County Park and Recreation and several service providers to create an education-centered mixed-income community.

Why Boulevard Homes?

- Built in 1969 and located at the corner of West Blvd and Billy Graham Parkway, the property houses over 900 public housing residents in 300 units.
- Significant crime issues and disinvestment in the immediate neighborhood
- Highest capital needs in CHA's portfolio
- Represents a continuation of Charlotte's investment in the West Boulevard Corridor - and an opportunity to support that investment at one of the gateways to the City
- Greatest potential for innovative partnerships

Redevelopment Plan

- CHA is committed to replacing the 300 public housing units by providing new units both on-site and at several off-site developments. CHA is has received a commitment of housing funds and infrastructure funds from the City of Charlotte. The onsite redevelopment will consist of:



- a. 200-300 mixed-income family units
(*very low income, workforce and market units*)
 - b. 80-120 independent living units for seniors
- The services network will focus on youth, family and community to offer education, social services and community-building programs to neighborhood residents and surrounding communities. This comprehensive and unique educational-based approach should help make this Charlotte's most successful HOPE VI redevelopment yet.



Educational Village Concept

- The revitalization plan creates an “educational village” located at the entrance to the new community. Designed to connect the residents at every stage of learning, the village brings together the following:
 - a. A signature K - 8 school
 - b. An early childhood development center
 - c. A state-of-the-art community space

Other Partnerships

- Mecklenburg County Park and Recreation – Park and Recreation will manage the school’s recreational space and the community space, in conjunction with their Southview Recreational Center. The redevelopment also incorporates and connects the greenway and trails system.
- Child Development Center - There will be a child development center on-site with a research-based curriculum that provides scholarships and priority for neighborhood residents.
- Central Piedmont Community College - With its Harris Campus located just north of the community, CPCC will provide onsite adult education classes, job training programs, a computer lab and computer classes.

Harlem Children’s Zone/West Boulevard Corridor Redevelopment

- The Harlem Children’s Zone (HCZ) is a non-profit community agency that runs a broad-based program to meet the educational, health, and social-service needs of residents in nearly 100 blocks of central Harlem. HCZ focuses on providing support for children, and their families, from birth until graduation. As part of Moving Forward and the Boulevard Homes Redevelopment, CHA is exploring HCZ and other similar models to design a Charlotte model in the West Boulevard Corridor. This model will incorporate an education continuum, social services and community building.

- ❖ **Leveraged Partnerships** CHA recognizes that even with MTW flexibility, it is only through the power of partnerships that the agency is able to expand its resources and programs. Homeownership, character development, financial literacy, academic & employment training programs as well as supportive & health services are just a small range of the agency partnerships CHA networks with to enable residents to move forward. In order to analyze the existing partnerships and establish a process for identifying collaborations that are most vital to Moving Forward and the families it will impact, the agency enlisted the services of the Lee Institute, a non-profit organization that designs projects to bring about collaboration with community involvement. The Lee Institute is also engaged in helping the agency increase community awareness and “buy-in” to Moving Forward. An advocacy strategy was instituted beginning with the Authority’s CEO meeting with elected officials, community leaders and other professional associates. One result of these meetings was an outline for an advisory council who would bring community input from each of their unique perspectives and provide feedback to the CEO on the Authority’s existing and potential role in serving the housing continuum. Establishing an advisory council creates the opportunity for community input to CHA and the CEO on the work and perception of CHA. The council will meet twice a year, with council members engaging in the work of CHA through sharing their feedback, advice and perspectives. Additional benefits of the advisory committee would be the identification of the current initiatives that exist or have been proposed by these stakeholders that may overlap with CHA’s scope of work. This potential to leverage resources will deliver more effective services, prove cost effective and address both the affordable housing shortage & the need for housing along a continuum.

- ❖ **With Every Heartbeat Is Life** This initiative is a partnership between HUD and The National Heart, Lung, and Blood Institute. NIH (National Institute of Health) created the project, With Every Heartbeat Is Life, to help African Americans prevent heart disease.

Who will CHA serve under this initiative and how?

- CHA will target the residents of Boulevard Homes and Southside Homes (680 families). Boulevard Homes was selected because of our HOPE VI initiative; Southside Homes was chosen because we want to have a centralized pilot with volume outcomes.
- Surveys were conducted at the two selected sites to determine how many residents may have heart disease risk factors. This survey was drafted by National Institute of Health. The survey results were sent to HUD. Survey results will be used to determine the need for referrals to a Community Health Center.
- CHA will host a kick-off event & recruitment event, followed by 10 weekly sessions at each site that will educate residents on knowing their risk factors for heart disease and empower them to do something about it.
- Trained community health workers (5 CHA residents who have attended the HUD training) will assist with training/educating residents during monthly workshops. More residents will be recruited as the process continues so that the program will be sustainable as residents move up and out of housing.



- CHA developed a partnership with C.W. Williams, a local HRSA (Health Resources and Services Administration), to assist with facilitating monthly workshops. HUD has indicated they will be assisting PHAs in solidifying these relationships.
- Residents who are identified as having risk factors during the workshops will be given the opportunity to receive health services with C.W. Williams.

Success equals:

- Increased knowledge about heart disease risk factors
- Promote healthy lifestyle behaviors
- Implement activities within public housing communities to help individuals, families, and communities:
 - Reduce Cardiovascular Disease risk factors, such as high blood pressure, high cholesterol, diabetes, cigarette smoking & obesity
 - Promote healthy eating and physical activity

Goals/Objectives for WEHTL Sessions:

- 20% of residents who demonstrate risk factors from needs analysis will attend program.
- 80% of residents who attend will increase their knowledge about cardiovascular disease through pre and post test quizzes.
- 50% of residents who attend the program will address their cardiovascular disease risk factors as demonstrated on pre and post program health screenings.
- 100% of those who participate will have a quantifiable change in lifestyle behavior (Ex: increased physical behavior, healthy food and nutrition choices, connection/access to medical care)
- 50% of able bodied participants who attend and complete the program will obtain and maintain employment due to an achievement of a healthier lifestyle and choices which may remove previous employment barriers.

❖ **Public Participation**

A resident/participant annual planning session was held September 2009 to discuss ongoing initiatives, provide updates on case management & the revised rent reform as well as gather suggestions & feedback on the draft. A few sites were visited by MTW staff prior to and during the development of the plan to advise residents of the opportunity to make suggestions on activities CHA should explore and the public review dates for feedback. An additional group of sites were selected for presentation of the plan during the public review period. Documentation of the public hearing comments is recorded in Appendix B.

Below is a summary of the Moving Forward initiatives implemented by the Charlotte Housing Authority. More detailed information on the initiatives is highlighted in the New and Ongoing MTW Activities Sections.

Housing Authority of the City of Charlotte Moving Forward Initiatives Summary

PAGE	APPROVED HUD INITIATIVES	DESCRIPTION	FISCAL YEAR IDENTIFIED	STATUS
21	Amend Section 8 Housing Assistance Payment (HAP) Agreement	CHA amended the HAP Agreement to make changes such as inclusion of an owner registration requirement and mandatory direct deposit. The revised HAP Agreement mandates that the owner must notify the family and CHA in writing of any foreclosure notices and that the tenant is not responsible for payment of the CHA portion of the HAP during the term of the HAP contract.	2008-2009	In Development
22	Housing for persons with disabilities, special needs and homeless	CHA created and enhanced relationships with local social service provider agencies by working with two major nonprofit providers on new supportive housing projects.	2008-2009	Implemented FY 2008 – 2009 Ongoing
24	Alternate Review Process	Beginning January 2010 re-certifications for senior/disabled will be bi-annual; criminal background checks will be conducted at recertification; and rent reform initiated.	2008-2009	In Development
25	Rent Reform and Work Requirement	Proposing modification of rent calculation and increase in minimal rent. A hardship policy will be in place. A Work Requirement Initiative will be implemented in FY 2010 - 2011.	2009-2010	In Development
31	Revise subsidy structure for developments in which CHA is direct developer	CHA designed a new rent structure for new and rehabilitated Public Housing developments when CHA is the direct developer.	2008-2009	In Development
32	Occupancy Training (formerly Section 8 Training)	CHA and Central Piedmont Community College conduct “Good Neighbors” type training for all new Section 8 participants to assist families in their acclimation into a neighborhood. CHA plans to revise the mandated occupancy training curriculum for FY 2010 and include public housing residents.	2007-2008	Implemented FY 2007 - 2008 Ongoing

PAGE	APPROVED HUD INITIATIVES	DESCRIPTION	FISCAL YEAR IDENTIFIED	STATUS
34	Site-based waiting lists Public Housing and Project Based Section 8.	All public housing and Project-based Section 8 property waiting lists are managed at the site level.	2008-2009	Implemented FY 2008 – 2009 Ongoing
35	Develop CHA Standardized Form	The Charlotte Housing Authority has developed a CHA Housing Choice Voucher Form similar to HUD Form 52646 (Housing Choice Voucher) to allow for more than one extension approval and to incorporate additional family obligations.	2009-2010	Implemented FY 2009 – 2010 Ongoing
36	Single fund budget with full flexibility	CHA combined its public housing operating subsidies, public housing capital funds and its Housing Choice Voucher Program assistance into a single, authority-wide funding source.	2008-2009	Implemented FY 2008 – 2009 Ongoing
38	Adopt investment policies consistent with state law	CHA adopted investment policies that are consistent with state law to achieve a portfolio which is safer, more liquid and obtains competitive yield.	2008-2009	Implemented FY 2008 – 2009 Ongoing
39	Modify Section 8 inspection procedures	CHA received approval from HUD to waive the requirement for an initial Housing Quality Standards (HQS) inspection on newly constructed Section 8 units and utilize local building standards inspection and subsequent issuance of a Certificate of Occupancy (CO) as a substitution of the initial or move-in inspection.	2008-2009	Implemented FY 2008 – 2009 Ongoing
39	Section 8 Property Rating System	A quantitative evaluation rating system for the exterior appearance of a Section 8 property was developed to improve the housing quality standards of participating property owners.	2007-2008	Implemented FY 2007 – 2008 Ongoing
40	Community Based Rental Assistance (Streamline Project-Based Section 8 Process)	Simplified the selection process in order to maximize the number of quality Section 8 assisted units throughout Charlotte.	2008-2009	Implemented FY 2008 – 2009 Ongoing

PAGE	APPROVED HUD INITIATIVES	DESCRIPTION	FISCAL YEAR IDENTIFIED	STATUS
41	Resident Safety Initiative	The Resident Safety Department expanded the types of crime prevention initiatives and program enforcement initiatives for both CHA public housing sites and Section 8 properties.	2009-2010	Implemented FY 2009 – 2010 Ongoing
42	Currents of Change	The Currents of Change Program is designed to stabilize and improve families by fortifying them through education, life skills, motivation and employment training to compete in the economic marketplace.	2008-2009	Implemented FY 2008 – 2009 Ongoing
47	Youth Services	CHA is focused on providing services for youth that connect them to programs and services that address truancy, post-secondary education preparation, and academic performance improvement.	2008-2009	Implemented FY 2008 – 2009 Ongoing
49	Participant and landlord tracking program	The University of North Carolina at Charlotte's (UNCC) utilized a Geographic Information Science (GIS) mapping system to identify voucher holders within Mecklenburg County in order to analyze the census tracts with a large number of Section 8 voucher holders to assist with deconcentration.	2007-2008	Implemented FY 2007 – 2008 Ongoing
50	Develop local design standards	CHA adopted local design standards that correlate with other funding sources available in Charlotte and the State of North Carolina.	2008-2009	Completed/ Tracking
51	Use single fund flexibility to develop additional units	CHA will use block grant funding to leverage financing for the development of 100 new or rehabilitated affordable housing units each year of the MTW program.	2008-2009	Implemented FY 2008 – 2009 Ongoing
52	Increase acquisition and rehabilitation of existing multi-family properties	CHA established a strategy and adopted a policy to increase the acquisition and rehabilitation of existing multifamily properties.	2008-2009	Implemented FY 2008 – 2009 Ongoing

PAGE	APPROVED HUD INITIATIVES	DESCRIPTION	FISCAL YEAR IDENTIFIED	STATUS
53	Partner with CMS for mixed income affordable units	Established a partnership with Charlotte Mecklenburg Schools to produce mixed-income affordable housing units and identified two potential sites.	2008-2009	Implemented FY 2008 – 2009 Ongoing
53	Land Acquisition for Future Use	CHA will design local standards to guide land purchases in desirable, rapidly growing areas to provide more housing choices.	2008-2009	Implemented FY 2008 – 2009 Ongoing
	COMPLETED INITIATIVES			
54	Affordable Housing Impact Studies	CHA commissioned UNCC to research the pattern and density of affordable housing and evaluate the association between the housing stock and crime rate, housing and property values, and school equity in surrounding residential communities.	2007-2008	Completed
55	Assess Section 8 program participants	CHA surveyed all Section 8 program participants to measure their capacity for independent living. CHA will connect them with the services necessary to facilitate their progress toward that goal.	2008-2009	Completed

GENERAL HOUSING AUTHORITY OPERATING INFORMATION

This section addresses the Charlotte Housing Authority's housing stock information for FY 2011. Information regarding the number of public housing units, housing choice vouchers (Section 8 tenant-based assistance program), as well as the leasing information and waiting lists are provided per Attachment B of the Amended and Restated Moving To Work Agreement. It is important to note that in some instances, the information provided is anticipated or proposed and may be subject to change during the Plan year. Actual information is provided in the Annual Report at the conclusion of the fiscal year.

HOUSING STOCK INFORMATION

- CHA currently has 3,186 ACC units. It is estimated that there will be 3,026 units at the beginning of the fiscal year, April 1, 2010.

Public Housing Units							
	0BR	1BR	2BR	3BR	4BR	5BR	Total
Total HOPE VI Development	0	285	336	261	27	1	910
Total Public Housing Developments	554	499	526	490	179	28	2,276
<i>Total Units August 2009</i>	554	784	862	751	206	29	3,186
Removals August 2009 – March 2010	0	(40)	(32)	(46)	(42)	(0)	(160)
<i>Net Units April 1, 2010</i>	554	744	830	705	164	29	3,026
Removals April 2010 – March 2011	(32)	(11)	(44)	(52)	(24)	(20)	(183)
Additions April 2010 – March 2011	63	110	31	7			211
<i>Total Estimated Units FY2011</i>	585	843	817	660	140	9	3,054

- The demolition of Boulevard Homes will be a planned significant capital expenditure that is greater than 30% of the total budgeted capital expenditure for the fiscal year. The Boulevard Homes demolition will be paid from the American Recovery and Reinvestment Act of 2009 (ARRA) funds. The demolition, which will be phased, is expected to begin April 2010 and end by March 2011. The Boulevard Homes demolition project is estimated to cost \$2M.

- During fiscal year 2011, CHA plans to add 185 new public housing units. The development descriptions are shown in the chart below.

Property	Type	Accessible Features	Total Units in Development	Public Housing Units						
				0BR	1BR	2BR	3BR	4BR	5BR	Total
Belmont Infill	<i>Supportive/Transitional</i>	ADA Compliant	24		5	5				10
Little Rock	<i>Family</i>	ADA Compliant	242							0
McMullen Woods	<i>Family</i>	ADA Compliant	55							0
The Lofts @ Seigle Point	<i>Family</i>	ADA Compliant	190							0
Woodlawn House	<i>Seniors</i>	Will Be Compliant After Acquisition	104		34	18				52
Steele Creek	<i>Seniors</i>	ADA Compliant	120		60					60
McCreesh Place	<i>Supportive/Transitional</i>	ADA Compliant	91	63						63

- CHA plans to remove 183 public housing units from the inventory during the year. CHA plans to phase the removal of Boulevard Homes units. Charlottetown Terrace and Strawn Hi-Rise will be completely gutted and rehabbed as part of a modernization project. Additional amenities will be added to the project. All of the projects will become energy efficient sites. The units removed will be converted to alternate uses for the residents.

Property	Type	Total Units in Developments	Public Housing Units							
			0BR	1BR	2BR	3BR	4BR	5BR	Total	
Charlottetown Terrace	<i>Seniors</i>	(179)	(14)	(4)						(18)
Strawn Hi-Rise	<i>Seniors</i>	(195)	(18)	(7)						(25)
Boulevard Homes	<i>Family</i>	(300)			(44)	(52)	(24)	(20)		(140)

- There will be 4,268 MTW Housing Choice Vouchers (HCV) authorized for the Housing Authority of the City of Charlotte on April 1, 2010. CHA will administer 434 portable vouchers.

- There will be 147 non-MTW HCV units authorized. This number is comprised of 12 Disaster Housing Assistance Payment Vouchers, 100 Family Unification vouchers and 35 Veteran Administration Supportive Housing Program Vouchers.
- The number of HCV units to be project-based during the Plan year is 699. A description of each separate project is illustrated in Table PB1 beginning with the current count and continuing through the end of the fiscal year.

Table PB1

Property	Type	Total Units in Developments	Project Based Section 8 (PBS8)Units					Total
			1BR	2BR	3BR	4BR	5BR	
Hope VI Developments								
940 Brevard	Senior/Mixed Affordable	100	60					60
Ashley Park Multi-Family/ Live Oak (Springcroft) ***	Family/Mixed Affordable	176	4	10				14
McAden Park (Siegle 60)	Family/Mixed Affordable	60		3	18	9		30
McCreesh Place Apartments		91	27					27
Prosperity Creek	Family/Mixed Affordable	168	72	12				84
Seigle Point Apartment Homes	Family/Mixed Affordable	204	3	13	2			18
Springcroft @ Ashley Park / Live Oak Seniors	Seniors/Mixed Affordable	50	18					18
YWCA		10			7	3		10
Total Project Based HCV Units		859	184	38	27	12	0	261
Additions August 2009 - March 2010								
Cherry Gardens Senior	Seniors	11	11					11
Total Estimated Project Based HCV Units @ March 2010		870	195	38	27	12	0	272
No PBS8 Removals April 2010 - March 2011								
Additions April 2010 - March 2011								
Belmont Infill		24	7	7				14

Little Rock		242	16	106	100	20		242
McMullen Woods		55		11	10			21
The Lofts @ Seigle Point		190	14	18	6			38
Steele Creek		120		30	30			60
Woodlawn House		104	34	18				52
Total Net Project Based HCV Units April 2010 - March 2011		735	71	190	146	20	0	427
Total Estimated Project Based HCV Units in April 2011		1,605	266	228	173	32	0	699

LEASING INFORMATION

- CHA anticipates leasing 3,054 MTW public housing units in the Plan year.
- CHA does not have any non-MTW public housing units.
- CHA anticipates leasing 4,268 MTW HCV's in the Plan year.
- CHA anticipates leasing 147 non-MTW HCV units in the Plan year.
- It is anticipated that there will be difficulty leasing the studio apartments in the high-rises when the waitlists are open based on current performance. There are several factors contributing to slow lease up of zero bedrooms. In some instances, applicants are not qualifying during screening process or they are turning down units because they don't want to live in hi rises or a studio style apartment. The agency is still exceeding HUD standards for lease up time frame.
- CHA will have 272 Project Based vouchers in-use at the start of the Plan year.

WAITING LIST INFORMATION

- The Charlotte Housing Authority does anticipate a change in the waiting lists for public housing and the Housing Choice Voucher Program as a result of its planned re-opening of all wait lists. The authority uses a single waiting list for admission to its Housing Choice Voucher Program. For families on the Housing Choice Voucher waiting list, families will be selected when assistance is available in their determined sequence, subject to targeting requirements. The CHA maintains a site-based waiting list for all public housing sites. Except for Special Admissions, applicants will be selected from the CHA waiting list in accordance with policies, preferences, and income targeting requirements. A public housing applicant will be offered a maximum of three (3) housing sites within their chosen sites. If an applicant rejects the third consecutive offer, they will be removed from all public housing site-based waiting lists that they may be on.

- The Tenant-Based (Section 8) Housing Choice Voucher Waiting List is currently closed and not accepting applications. The agency is expected to open the wait list in FY2011. The wait list for the HCV Program is anticipated to increase when the waitlist is open , as has occurred on previous occasions. CHA does expect that the waiting list for public housing units will increase due to the relocation of families from Boulevard Homes, a Hope VI candidate. The public housing waiting lists are currently open for several mixed income and senior/disabled sites. The remaining waiting lists are closed. If the waiting lists are opened, a press release is sent to the media and the information is posted on CHA’s website page titled *Open Wait Lists*.

The **Public Housing Wait list** had 3,212 families as of December 2009. The desired bedroom is identified in the chart below, as well as the type of household applicants.

Bedroom size	No. of applicants	Single	Family
0	1,090	1,085	5
1	210	183	27
2	952	13	939
3	499	0	499
4	419	4	415
5	42	0	42
Total	3,212	1,285	1,927

The **Housing Choice Voucher Program** had a wait list of 2,506 households as of December 2009. The breakdown by type is illustrated in the charts below.

Single	Family	Total
219	2,287	2,506

NON-MTW RELATED HOUSING AUTHORITY INFORMATION (Optional)

Changing CHA's Structure & Footprint

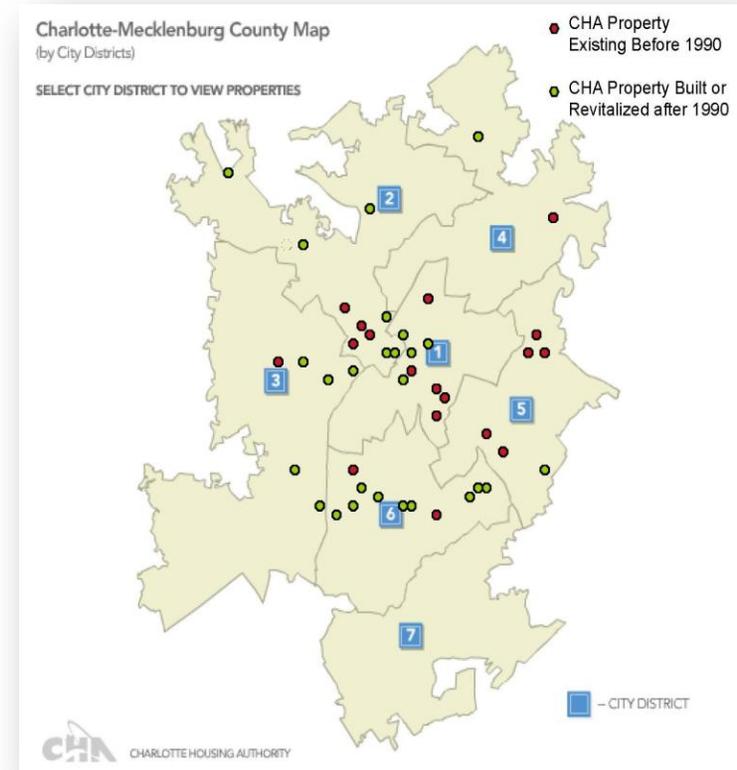
CHA will begin steps towards becoming a redevelopment commission and expanding its Section 9 jurisdiction countywide. Restructuring or reconstituting the Authority has several benefits:

1. Expanding the jurisdiction of the Authority could increase Section 9 (housing units that receive a operating subsidy authorized by Section 9 of the federal housing act) capacity by as much as 50%. Presently CHA has a limited number of Section 9 capacity left, as well as a limited footprint to operate additional Section 9 units. If left as it currently stands, this will result in a small impact on meeting the affordable housing needs.
2. Expanding the agency's ability to engage in non-residential real estate activity for the purpose of benefiting CHA's mission.
3. Increasing the financial resources available to the agency.

Section 3

CHA is committed to helping the residents of its communities move towards self-sufficiency by providing opportunities for training and employment. CHA provides employment opportunities by encouraging its many contractors to hire qualified residents of CHA communities, connecting residents to job training and placement activities, and providing program coordination that facilitates economic opportunities to residents.

CHA fully embraces the spirit and intent of its obligations as defined under Section 3 of the Housing and Urban Development Act of 1968. 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 provide job training, employment, and contracting opportunities for low-or very-low income residents in connection with projects and activities in their neighborhood.



CHA has established employment and training goals that contractors and subcontractors should meet in order to comply with Section 3 requirements: 1) 30% of new hires each year be qualifying public housing residents as a result of contracts with CHA and 2) contractors must subcontract at least 10% of the award to qualifying Section 3 business concerns.

Capital Fund Recovery Competition

In August 2009, CHA applied for funding under the Capital Fund Recovery Competition grant program authorized by the 2009 American Reinvestment and Recovery Act for funds to provide \$6.2million in funding for the Category 4 (Green Communities) Capital Fund Recovery Competition (CFRC) for the Charlottetown Terrace redevelopment. The redevelopment will provide a “service-rich” environment for the residents. Medical offices and other various offices for non-profit and government social service providers will be provided on site. Some amenities in the redevelopment include: multi - purpose room, commercial kitchen, computer center, theater room, hair salon, fitness center, activities room, lounge, and library.



Affordable Housing Inventory Analysis

The Charlotte Housing Authority and its Affordable Housing Study Partners, (The Housing Partnership, the City of Charlotte Neighborhood Development Department, Mecklenburg County Department of Social Services, Crisis Assistance Ministries, A Way Home, Legal Aide of North Carolina, and the Urban Ministry Center) hereinafter referred to as the “Housing Study Commission”, are partnering to conduct a study to collect and analyze data for the creation of a comprehensive affordable housing market study.

The study will focus on very-low income households and individuals that earn no more than 30% of the area median income. As a secondary and complementary analysis, the study will also examine households that earn between 30% and 60% of area median income. These moderate income levels will often exist within mixed-income developments as a strategic configuration of affordable housing communities developed in Charlotte/Mecklenburg moving forward. Affordable housing for these income groups means that housing costs (exclusive of utilities) do not exceed 30% of the family’s or individual’s gross income.

The primary purpose of the study is to create an in-depth and comprehensive database that quantifies and qualifies the unmet affordable housing demand. This includes quantifying the unmet demand for affordable housing, determining the various ways in which families and individuals in these income groups are currently housed, and inventorying the current housing and accompanying supportive services. The study will also use the data to formulate projections, identify trends, evaluate existing barriers to housing for these families and individuals and recommend possible strategies to meet the unmet affordable housing need inclusive of supportive services. The study will be used as factual information to form the basis for policy and strategic business decisions for the members of the Housing Study Commission and the larger community.

LONG-TERM MTW PLAN

The Charlotte Housing Authority long term MTW plan continues to center around creating comprehensive solutions to transition low income families to self-sufficiency. The critical focus areas are Self-Sufficiency, Educating Children and Enhancing the Portfolio.

Self-Sufficiency

Self-Sufficiency strategies include the pursuing of Resident Opportunity for Self-Sufficiency (ROSS) grants, the Currents of Change Program, a Service Coordinator for the Elderly and Disabled and continuing the \$100,859 Jobs Access and Reverse Commute grant in partnership with the Charlotte Area Transportation System (CATS) which enables CHA to provide free bus passes' to residents/participants for job interviews, job training or work. The Charlotte Housing Authority is tracking its success in self-sufficiency initiatives by:

1. The employment rate for able-bodied heads of households and other family members
2. The number of family members in training and/or education programs
3. The increase in average and median income of families (all sources and earned income) (excluding seniors & disabled families)
4. Amount of funds leveraged for supportive services

Educating Children

As mentioned in the Introduction, CHA is exploring the Harlem Children's Zone and similar models to design a Charlotte model that will incorporate an education continuum that provides support for children, and their families, from birth until high school graduation. CHA recognizes that this is essential to decrease the generational poverty that is ingrained in our communities. Additional measures will be added as activities are added, however, current measures include:

1. The number of children who enter post secondary education
2. Percent increase in number of CHA students who enter the Charlotte Housing Authority Scholarship Fund program

Enhancing the Portfolio

Charlotte Housing Authority's Real Estate Division long term plans involve strategies to create safe environments that are economically self-sustaining and interface with the private sector. If HUD approval is granted, CHA intends to use MTW block grant funds for purposes outside the specific uses provided for in Section 8 (vouchers) and Section 9 (public housing), as well as conduct an affordable housing inventory assessment to impact the following measures over the next 10 years:

1. The number of housing units in mixed-income environments
2. The distribution of housing units and housing opportunities (a) Section 9 and (b) Project-based Section 8

PROPOSED MTW ACTIVITIES

STUDY AND POLICY INITIATIVES

1. HUD has approved the Charlotte Housing Authority's use of pro rata for units 80% area median income and below, therefore, CHA has removed the Local Total Development Cost (TDC) Limits activity because it no longer is necessary. When the activity was established, the TDC only applied to Section 9 units.

2. Activity Description

The CHA received approval to Amend the Section 8 Housing Assistance Payment (HAP) Agreement in the 2008 – 2009 MTW Annual Plan, however, the activity was not pursued because CHA decided in February 2009 that it would be more efficient to combine the Admissions and Continued Occupancy Plan with the Section 8 Administrative Plan and create one Housing Occupancy Plan. The Plan was approved by the full Board during the July 2009 Board meeting.

Per the approved activity for FY10 CHA amended part A of the Housing Assistance Payment contract in order to require all landlords to participate in direct deposit. The agreement also noted the agency will not enter into a contract in which the landlord does not agree to participate in direct deposit. Additionally, language was added to clarify that CHA is not liable for payment for any period prior to the move in date authorized by CHA. This activity will be completed in FY11.

How Activity Relates to Statutory Objective

This activity is related to the administrative efficiencies and cost savings statutory objective. This activity has tremendously decreased the number of checks that have to be voided and reissued, increasing administrative efficiencies and cost savings. The agency would like to implement an email direct deposit notification system for landlords in the future to further increase administrative efficiencies and cost savings by reducing costs associated with postage.

Anticipated Impact, Metric, Baseline, & Benchmark

Anticipated Impact	Metric	Baseline	Benchmark
Increase in the number of landlords that participate in the direct deposit program	Percent of landlords participating in direct deposit	78%	100% by March 31, 2011
Reduced transaction costs	Cost of processing	\$15,724/month (12.60/landlord direct deposit) and \$12,953.60/month (\$36.80/check)	\$20,160 by March 31, 2011

Data Collection

The Section 8 Accountant runs a quarterly report of landlords enrolled in Section 8 direct deposit using the Yardi Software System.

Authorization

Attachment C: Section D.1. a., D.1.c. and D. 5. The waiver is necessary so that the Agency can create a locally designed Housing Assistance Payment (HAP) contract to owners during the term of the MTW demonstration.

3. Activity Description

The activity, Housing for Persons with Disabilities, Special Needs and Homeless, was approved by HUD in the 2008 – 2009 MTW Annual Plan and CHA did pursue it during the fiscal year. CHA requests approval to modify this initiative to Allow Supportive Housing Providers with Public Housing Assistance to Waive the Lease Term Requirement in Public Housing. Most supportive housing programs operate on a month-to-month lease, so requiring them to modify their program to require year leases is significant. Especially when it comes to non-compliance and participant termination. The Section 9 subsidies available in Charlotte (historically around \$250/unit/month) have traditionally not been adequate to cover the operating expenses of larger units. While the new Project Expense Level (PEL) program is designed to address that problem, we still are experiencing operating shortfalls at our larger bedroom developments because in the past few years, subsidies have been funded at levels that are 85% or less of budget. Supportive housing units tend to be smaller and have a lower per unit operating cost. In addition, they tend to benefit from community fund-raising and support for social services. A Section 9 subsidy that might not be sustainable in a larger family



development is sufficient for a smaller supportive housing unit, especially given the additional community support. CHA is committed to returning to full utilization of Section 9 under the statutory cap.

CHA will focus its efforts on three primary areas:

1) Expansion of Project Based Section 8:

Continue the commitment to provide 300 project-based Section 8 subsidies for housing for persons with disabilities: In 2006, the CHA Board approved a commitment to assist in the construction of new units up to a goal of 300 units of housing for persons with disabilities by 2012. This effort dove-tails with a commitment by NCHFA and the Department of Health and Human Services (DHHS) at the state level to provide additional leveraged funding for special needs housing through the state Housing 400 program. Further, CHA will continue to work with developers with experience in providing this specialized housing and may get involved in some joint venture efforts at co-development.

2) Re-structure and expand McCreesh Place:

St. Peter’s Homes, Inc. (“St Peter’s Homes”), a non-profit organization in Charlotte dedicated to building affordable housing to alleviate homelessness owns and operates McCreesh Place. McCreesh Place opened in 2003 as a single room occupancy apartment community which provides full on-site supportive services for its residents. It provides housing to disabled men who were formerly homeless in a 21,000 square foot, 3-story building, with 64 apartment units on 1.15 acres located approximately two miles from center city Charlotte. CHA is working with St. Peter’s to add 27 efficiency units to their operation. The Mixed Finance process has been approved by the Board and closing is anticipated prior to the 2010 fiscal year end.

3) Moore Place:

CHA’s Board of Commissioners has conditionally approved a funding and subsidy commitment to Moore Place, an 80 unit Single Room Occupancy (SRO) for chronically homeless men and women.

How Activity Relates to Statutory Objective

This activity relates to the statutory objective to expand housing choices. CHA has an on-going commitment to provide housing for persons with disabilities and special needs and the homeless. One of the most cost-effective ways to return to full utilization of Section 9 units under the statutory cap is through the expansion of efforts to develop smaller supportive housing units that have the additional benefit of community subsidy for social services.

Anticipated Impact, Metric, Baseline & Benchmark

Anticipated Impact	Metric	Baseline	Benchmark
Increase in the number of projects financed, built or rehabilitated for target population	Number of units for special population	0	300 by March 31, 2012

Data Collection:

The staff continues to keep track of the number and type of projects financed, built or rehabilitated through the Housing for Persons with Disabilities and Special Needs Initiative. There were 10 Project-based Section 8 Vouchers committed to the Craig Avenue project, 11 to the Cherry Seniors project, 10 to the YWCA Families Together program and 27 to the McCreesh expansion during the fiscal year.

Authorization

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations. However, CHA may amend the Community Based Rental Assistance Policy approved by the Board of Commissioners because the agency is reassessing the length of commitment for Project Based Section 8. In addition to the existing authorization D. 1. – 4., CHA added the following Attachment C authorizations: **Attachment C: B. 2. and 4 and C. 2., 9., and 10.** This waiver will impact the agency by eliminating a major conflict between the public housing program and the best practices followed by supportive housing providers.

RENT REFORM INITIATIVES

1. Activity Description

The Alternate Review Process was approved by HUD for the 2008 – 2009 fiscal year, however it has not been implemented because the final process was not approved by the Board of Commissioners until July 2009. CHA proposed beginning the alternate review process in April 2009, but to simplify the implementation process, the Alternate Review will begin January 2010. CHA has developed a policy and received Board approval whereby there will be a bi-annual reexamination process for elderly and disabled families. The CHA defines elderly and disabled families in its newly revised policy, also approved by the Board. The schedule will require residents whose anniversary month is an even month (February, April, June, August, October and December) to recertify during the even years beginning 2010. Those participants whose anniversary month is an odd month (January, March, May, July, September, November) will recertify in the odd years, beginning 2011). CHA also proposes to conduct criminal background checks at recertification. CHA will continue to use the Enterprise Income Verification (EIV) System reports at recertification as mandated by HUD.

How Activity Relates to Statutory Objective

By taking this action the CHA will achieve administrative efficiency by focusing its reexamination efforts on those families who are not living on a fixed income; likely to have income increases not being reported timely; and working families identified as requiring intensive case management and/or who do not meet the minimum work requirement/training requirements established under this Plan.

Anticipated Impact, Metric, Baselines & Benchmarks

Anticipated Impact	Metric	Baseline	Benchmark
Reduction in the number of annual recertifications	Decrease in number of recertifications completed for elderly/disabled	2,000 – 2,200	1,000- 1,200 annually

Data Collection

CHA's software system will be utilized to determine the number of Section 9 recertifications completed without alternate system. All recertifications are now completed by the property management staff.

Authorization

Attachment C: C. 4. The waiver allows the agency to reduce the time spent on recertifications.

2. Activity Description

CHA received approval to implement a Rent Reform and Work Requirement in the FY2010 Annual Plan. Since that time, CHA has made modifications to the Rent Reform proposal in order to simplify the calculation of families total tenant payment to provide a financial incentive for participants to increase their earnings. Elderly and disabled household participation will be voluntary. The Rent Simplification applies to both public housing and Section 8. CHA denotes items previously approved in the originally HUD approved activity. Items approved in Charlotte's Housing Occupancy Plan (HOP) by the Board of Commissioners in July 2009 are also noted.

Interim Recertifications (currently approved in HOP)

Participants will still be afforded interim rent recertification between annual recertifications providing they have met the established criteria. If there is a decrease in the family's income or an increase in medical expense or childcare expense which is expected to last longer than sixty (60) days and will change their flat deduction eligibility, the participant may request that an interim recertification be performed. Participants must still report changes in family size. Participants still need permission to add a household member.

Annualized Income (currently approved in HOP)

Income earned by seasonal employment will be annualized on a 12 month basis if the employee has maintained employment for more than 60 days. The income of employees of temporary employment agencies will be annualized after an initial 30 days of assignments.

Zero Income Recertifications (currently approved in HOP)

All families claiming zero income will have 90 days to establish either earned or unearned income. After 90 days they will be required to report to the CHA the status of their income; they will continue reporting to the Charlotte Housing Authority every 90 days until income has been established.

Income Exclusions

Income from assets of \$5,000 or less will be excluded allowing the accumulation of more assets before they are included in income. The annual recertification will include self-certification for assets below \$5,000, or third-party verification for assets over \$5,000. The use of a self-certification will reduce the amount of time staff spends completing recertifications.

Expense Adjustments

Traditional Medical and Childcare deductions are eliminated. Participants need only verify enough non-reimbursable expenses to meet the requested deduction level listed below.

Medical Expenses	Medical Deduction	Childcare Expense	Childcare Deduction
\$0 - \$2,499	\$0	\$0 - \$2,499	\$0
\$2,500 - \$4,999	\$2,500	\$2,500 - \$4,999	\$2,500
\$5,000 - \$7,499	\$5,000	\$5,000 - \$7,499	\$5,000
\$7,500+	\$7,500	\$7,500+	\$7,500

Households will continue to be given the HUD elderly/disabled household and dependent allowances as applicable.

Minimum Rents (currently approved in HOP and MTW annual plan)

Minimum rent increased to \$50 on April 1, 2009 and will increase to \$75 on September 1, 2010 and to \$100 on April 1, 2011. CHA has to complete upgrades to Yardi software system to begin using the new 50058.

Earned Income Disregard / Phase-In Rent

Traditional Earned Income Disregard will be eliminated. However, income increases of less than \$200 / month are not required to be reported (creating a revised disregard), unless the resident requests a recertification. The HUD Earned Income Disregard was a very time intensive process, difficult to track and complicated to explain to residents.

Revised Rent Schedule

CHA will implement an income-based stepped flat rent with stepped escrow deposits. The income bands will be a \$2,500 range with the stepped rent being 30% of the range midpoint (ex: \$2,500 – 4,999 annual income band midpoint is \$3,750 /12 (monthly)* 30% = \$94 total tenant payment). Annual adjusted income will be used to establish total tenant payment. Escrow deposits will begin when the household adjusted income including wages reaches \$12,500 and ends when the household adjusted income reaches 50% area median income (AMI) or 3 years after reaching 40% AMI whichever comes first. A ceiling flat rent will be established at Fair Market Rents for each bedroom size.

Assistance Sanctions (currently approved in HOP and MTW annual plan)

Participants who fail to comply with the terms of the Work requirement policy may be sanctioned. The sanctions will increase in magnitude the longer a resident is in non-compliance, and the sanctions shall be applied in phases as follows:

Phase I: Participants will have a three (3) month grace period to cure non-compliance; if not cured within three (3) months, Phase II sanctions will be applied.

Phase II: Participants will lose 50% of their rental assistance for up to six (6) months. If they fail to correct the non-compliance within six (6) months, Phase III sanctions will be applied.

Phase III: Participants will lose 100% of their rental assistance for six (6) months and will be required to pay the established market rent. Participants still have the option to cure the non-compliance during the 6-month period while they are paying

market rent. If Participants fail to cure the non-compliance by the end of the 6-month period they will continue to pay market rent and move to Phase IV.

Phase IV: Participant's Assistance will be terminated and their incentive account, if any, is forfeited due to non-compliance.

Participants who have a second incident of non-compliance within twelve (12) months of the initial incident of non-compliance will move directly to Phase III of the sanctions.

Impact Analysis The Rent Simplification Impact Analysis was conducted by Edgemere Consulting. A summary of the methodology, assumptions and results is attached as Appendix I.

Hardship Policy (currently approved in HOP)

Applying for Hardship Rent.

The Hardship Review Committee was created to review individual cases of significant rent burdens or increases for families with high cost of living, childcare or medical expenses. Participants can request a Hardship Waiver Request form from their manager. Participants must make their request for Hardship Review no later than thirty (30) calendar days after notification of increased rent or the occurrence of a hardship event.

Who Qualifies for a Hardship Rent?

In order for a family to qualify for a hardship exception, the family's circumstances must fall under one of the following hardship criteria:

- The family has lost eligibility or is awaiting an eligibility determination for federal, state or local assistance, including a family with a member who is a non-citizen lawfully admitted for permanent residence under the

Immigration and Nationality Act, and who would be entitled to public benefits but for Title IV of the Personal Responsibility and Work Opportunity Act of 1996.

- The family would be evicted as a result of the imposition of the minimum rent requirement.
- The income of the family has decreased because of changed circumstances, including loss of employment, change in Household composition, or other circumstances as determined by the CHA or HUD.
- When the family has a significant increase in expenses because of changed circumstances for medical costs, childcare, transportation, or education.
- When a death has occurred in the family (spouse, child, brother, sister, aunt, uncle, niece, nephew or in-law) and the expenses for funeral, burial and related expenses has caused a financial hardship to the family.
- Where the Head of Household is Disabled as defined in the Hardship policy.
- Where the Head of Household is Elderly as defined in the Hardship policy.

How does the committee work?

The Hardship Review Committee meets regularly to review each resident's Hardship Waiver Request. The Hardship Review Committee will examine each family's circumstances on a case-by-case basis. The Hardship Review Committee has a choice of six remedies it can recommend as it deems appropriate, to reduce a qualifying Household's rent burden:

- Temporary suspension of minimum rent (90 days);
- Set interim rent at pre-rent reform rent for a specified period of time not to exceed one year;
- Long Term waiver of minimum rent;

- Extend \$100 monthly rent increase cap for up to one year (not to exceed two years total);
- Phase \$100 per month rent increase cap out over specified period of time beyond the 2 year remedy described above; or
- Appropriate combination of remedies listed above.

The Hardship Committee will send its recommendation to the department director to approve or disapprove. The department director will return the decision to the manager and applicant. Applicants who disagree with the Committee's decision can request a Grievance hearing. CHA will take no action to change a resident's rent in cases where a Grievance hearing has been requested.

Three-Year Incentives Period (approved in previous rent reform proposal / MTW annual plan) Once a participant's earnings reach 40% AMI, the resident has three years (or until their income reaches 50% AMI) in which to build assets based on increased earnings. During this incentive period, residents can build assets in their Incentive Accounts by maintaining or increasing their earnings and moving into the next income band.

Example -1 Bedroom Alternative Rent Schedule

Minimum Rent = \$75

Income Range		30% of mid	TTP	Incentive Account Deposit	CHA portion
\$0	\$2,499	\$31	\$75	\$0	\$75*
\$2,500	\$4,999	\$94	\$94	\$0	\$94
\$5,000	\$7,499	\$156	\$156	\$0	\$156
\$7,500	\$9,999	\$219	\$219	\$0	\$219
\$10,000	\$12,499	\$281	\$281	\$0	\$281
\$12,500	\$14,999	\$344	\$344	\$10	\$334
\$15,000	\$17,499	\$406	\$406	\$15	\$391
\$17,500	\$19,999	\$469	\$469	\$20	\$449
\$20,000	\$22,499	\$531	\$531	\$30	\$501
\$22,500	\$24,999	\$594	\$594	\$40	\$554
\$25,000	\$27,499	\$656	\$656	\$50	\$606**
\$27,500	\$29,999	\$719	\$682	\$50	\$632***
\$30,000	\$32,499	\$781	\$682	\$50	\$632
\$32,500	\$34,999	\$844	\$682	\$50	\$632
\$35,000	\$37,499	\$906	\$682	\$0	\$682****
\$37,500	\$39,999	\$969	\$682	\$0	\$682
\$40,000	\$42,499	\$1,031	\$682	\$0	\$682
\$42,500	\$44,999	\$1,094	\$682	\$0	\$682
\$45,000	\$47,499	\$1,156	\$682	\$0	\$682
\$47,500	\$49,999	\$1,219	\$682	\$0	\$682

*Minimum Rent is greater than 30% of income
 **40% Average Median Income (AMI)
 ***Fair Market Rent is less than 30% of income
 ****50% AMI is reached, incentive account deposits end

Example -2 Bedroom Alternative Rent Schedule

Minimum Rent = \$75

Income Range		30% of mid	TTP	Incentive Account Deposit	CHA portion
\$0	\$2,499	\$31	75	0	75*
\$2,500	\$4,999	\$94	\$94	0	\$94
\$5,000	\$7,499	\$156	\$156	0	\$156
\$7,500	\$9,999	\$219	\$219	0	\$219
\$10,000	\$12,499	\$281	\$281	0	\$281
\$12,500	\$14,999	\$344	\$344	10	\$334
\$15,000	\$17,499	\$406	\$406	15	\$391
\$17,500	\$19,999	\$469	\$469	20	\$449
\$20,000	\$22,499	\$531	\$531	30	\$501
\$22,500	\$24,999	\$594	\$594	40	\$554
\$25,000	\$27,499	\$656	\$656	50	\$606**
\$27,500	\$29,999	\$719	\$719	50	\$669
\$30,000	\$32,499	\$781	\$757	50	\$707***
\$32,500	\$34,999	\$844	\$757	50	\$707
\$35,000	\$37,499	\$906	\$757	0	\$757****
\$37,500	\$39,999	\$969	\$757	0	\$757
\$40,000	\$42,499	\$1,031	\$757	0	\$757
\$42,500	\$44,999	\$1,094	\$757	0	\$757
\$45,000	\$47,499	\$1,156	\$757	0	\$757
\$47,500	\$49,999	\$1,219	\$757	0	\$757

*Minimum Rent is greater than 30% of income
 **40% Average Median Income (AMI)
 ***Fair Market Rent is less than 30% of income
 ****50% AMI is reached, incentive account deposits end

Example -3 Bedroom Alternative Rent Schedule

Minimum Rent = \$75

Income Range		30% of mid	TTP	Incentive Account Deposit	CHA portion
\$0	\$2,499	\$31	\$75	\$0	\$75*
\$2,500	\$4,999	\$94	\$94	\$0	\$94
\$5,000	\$7,499	\$156	\$156	\$0	\$156
\$7,500	\$9,999	\$219	\$219	\$0	\$219
\$10,000	\$12,499	\$281	\$281	\$0	\$281
\$12,500	\$14,999	\$344	\$344	\$10	\$334
\$15,000	\$17,499	\$406	\$406	\$15	\$391
\$17,500	\$19,999	\$469	\$469	\$20	\$449
\$20,000	\$22,499	\$531	\$531	\$30	\$501
\$22,500	\$24,999	\$594	\$594	\$40	\$554
\$25,000	\$27,499	\$656	\$656	\$50	\$606**
\$27,500	\$29,999	\$719	\$719	\$50	\$669
\$30,000	\$32,499	\$781	\$781	\$50	\$731
\$32,500	\$34,999	\$844	\$844	\$50	\$794
\$35,000	\$37,499	\$906	\$906	\$0	\$906***
\$37,500	\$39,999	\$969	\$954	\$0	\$954****
\$40,000	\$42,499	\$1,031	\$954	\$0	\$954
\$42,500	\$44,999	\$1,094	\$954	\$0	\$954
\$45,000	\$47,499	\$1,156	\$954	\$0	\$954
\$47,500	\$49,999	\$1,219	\$954	\$0	\$954

*Minimum Rent is greater than 30% of income
 **40% Average Median Income (AMI)
 ***Fair Market Rent is less than 30% of income
 ****50% AMI is reached, incentive account deposits end



Disbursing Incentive Accounts (approved in previous rent reform proposal / MTW annual plan) Participants can access their Incentive Accounts for any reason once they leave subsidized housing or the

voucher program. While they continue to receive housing subsidy, however, account access will be limited to amounts needed to help participants overcome specific verifiable barriers to work. An example is for repairs to, or purchase of, a car needed to get to work. Disbursing Incentive Accounts will be done on a case-by-case basis and no more than 50% of the incentive account may be dispersed prior to assistance termination.

End of Program (approved in previous rent reform / MTW annual plan) Once the three-year Incentives Period is over, participants do not build any additional incentive account. However, they may continue to receive assistance until they are ready to move on. Participants will be encouraged to move when 40% of AMI is attained. If a participant moves within 3 years of completion they will be entitled to the full account balance; after 3 years the incentive will begin to diminish as shown in the chart below.

Timeframe for participant to exit program after completion	Percentage of Incentive Account participant is entitled to
Within 3 years	100%
3-4 years	80%
4-5 years	60%
5-6 years	40 %
6-7 years	20%
More than 7 years	0%

How Activity Relates to Statutory Objective

The Rent Reform and Work Requirement Initiative promote work by requiring it for program compliance. By modifying the formula for calculating families’ rent obligation CHA will provide a strong financial incentive for residents to increase their earnings. The new formula will allow all residents to build assets as their earnings grow. It also will ensure that rent levels remain affordable at all times, while nevertheless preparing residents to afford market rents as their incomes grow. An incentivized work requirement will provide an increase in household income. The availability of life skills and work support programs to be delivered by private case management will promote household stabilization and participants will be able to develop a defined goal towards self-reliance.

Anticipated Impact, Metric, Baselines & Benchmarks

Anticipated Impact	Metric	Baseline	Benchmark FY11
Increase in earned income	Amount of earned wages	\$12,589	\$12,903 (2.5%)
Increase number of members with earned income	# of working households	1,980	2,178 (10%)
Decrease number of households paying minimum rent	Number of minimum rent households	1,486	1,337 (10%)

The benchmarks established were determined based on the average rate of inflation and cost of living. The benchmark for number of working households and number of minimum rent households will be reevaluated in Year 5. Below is the schedule for Years 2 – 5.

	Year 2	Year 3	Year 4	Year 5
Earned Wages Increase	\$13,225 (2.5%)	\$13,556 (2.5%)	\$13,895 (2.5%)	\$14,242 (2.5%)
# of Working Households Increase	2,574 (30%)	2,970 (50%)	3,168 (60%)	3,168 (60%)
# of Minimum Rent Households Decrease	1,040 (30%)	743 (50%)	371 (75%)	371 (75%)

Data Collection

Through Yardi Software, annual recertification process and private case management, staff will collect:

- life skill, work support and educational program participation
- earned wages, percent change and sustainability of employment
- hours worked

Data will be reported annually.

Authorizations

The agency is authorized to conduct the activity under Attachment C: C4., C5., C11, D.2.a. and E. This waiver is necessary to implement a rent calculation modification outside of the HUD formula.

UNIT PRODUCTION INITIATIVES

1. Activity Description

CHA received approval to Revise Subsidy Structure for Developments in which CHA is Direct Developer, in the 2008 – 2009 MTW Annual Plan. However, CHA has not yet implemented the direct development rental subsidy funding in new construction projects because the primary financing vehicle for new construction is tax credits and CHA did not receive an allocation of 9% tax credits in the 2009 NCHFA cycle for any of its direct development projects. CHA expects to increase this activity substantially since the agency obtained authorization for flexibility in use of funds outside of Section 8 and 9 in March 2010.

CHA will design a new rent structure for new and rehabilitated Public Housing units for working families who will pay 30% of their income for rent. For these developments, CHA will set its monthly rental subsidy at the average rent in the submarket in which the development is located. A portion of the rent would be paid by the Project Expense Level (PEL) amount, but if the PEL is below the average rent in the submarket, or if the PEL is not fully funded in any given year, CHA would use MTW single fund budget to make up the difference. This would allow CHA to put unused public housing units on the ground (up to the statutory cap) and receive the related capital fund allocations. Ensuring that the rent stays at a set level increases the ability to finance the units with mortgage or other leveraged financing that could not be serviced at the lower rent levels. CHA is researching potential sources for the funding gap to cover the additional operating subsidy due to the inability to reserve MTW funds beyond the agreement period.

How Activity Relates to Statutory Objective

The revised structure will reduce cost and achieve greater cost effectiveness in Federal expenditures by providing better leveraging

and maximizing the housing available at 30% of median income and provide more housing choices for low income families.

Anticipated Impact, Metric, Baseline & Benchmark

Anticipated Impact	Metric	Baseline	Benchmark
Increase new and rehabilitated public housing units	Units constructed	0	50 by FY12

An internal decision has been made to fully fund the PEL for projects in which CHA is the direct developer.

Data Collection

The staff will track the number and type of projects constructed or rehabilitated.

Authorizations

The agency is authorized under Attachment C: C. 7. and B. 1. b. ii and Attachment D, Use of Funds.

2. Activity Description

The Occupancy Training (formerly Section 8 Training) was approved by HUD in the 2007 – 2008 MTW Annual Plan. The Good Neighbors Training began April 2008. CHA is working with Central Piedmont Community College (CPC) to offer “Good Neighbors” training to all applicants entering the program as a result of being pulled from the waiting list. The training is a component of the briefing that all participants must attend prior to the issuance of a Section 8 voucher. The training is designed to assist families in their acclimation into a neighborhood. Participants learn more about being a “Good Neighbor” by focusing on topic such as building codes and standards, property maintenance, basic zoning

regulations, home maintenance and conflict resolution. In FY 10 CHA mandated this training for all incoming portable participants, all applicants selected from the CHA waiting list and all existing participants.

In FY2011 CHA will redesign the occupancy training curriculum to include participation of public housing residents as well. Course topics will include CHA Policies & Family Obligations, How the CHA, landlord, and tenant relationship works, Tenant Responsibilities/Landlord Responsibilities, How to Choose a Neighborhood?, Homeownership Association (HOA) Guidelines, Health and Safety, Self-Sufficiency Programs Offered by the CHA, and Neighborhood/Community Resources. The revised occupancy training will be administered by community partner agencies or CHA staff.

How Activity Relates to Statutory Objective

This initiative is expected to decrease the number of lease or program violations that lead to terminations thereby maintaining a participant’s opportunity to meet the statutory objective to expand their housing choice.

Anticipated Impact, Metric, Baseline and Benchmark

In the past, CHA was tracking the number of persons who had completed the training and incurred any type of violation. Going forward, the benchmark and measure that will be used for occupancy training is to reduce the number of Type C complaints, violations, and terminations 3% due to Occupancy training. Type C violations are program and unit related violations (HQS Violations, housekeeping/trash, family obligation, HAP contract, abandon unit, no utility services). These topics will be covered in the revised occupancy training and relate to being a good neighbor and adhering to program requirements. In FY08, there were 193 persons trained, 386 in FY09 and 411 as of Dec 09 for FY10.

The chart labeled T1 shows a decrease in the number of violations and terminations after the training was implemented. In the 2009 Annual Report, CHA recorded less than 2%, however, the investigators were not aware that the parameters included those who had a violation brought into compliance.

Table T1

	Before Occupancy Training	After Occupancy Training
	Nov. 2007 – Aug. 2008	Nov. 2008 – Aug. 2009
Total Number of Violations	385	215
Total Number of Termination	126	46

Data Collection

At present CHA manually counts the number of persons completing the training, incurring a violation or terminated from the program quarterly. However, when the Yardi software upgrades are completed, the agency will be able to request a computer generated report.

Anticipated Impact	Metric	Baseline	Benchmark
Increase the receptiveness of Section 8 vouchers in communities	Number of persons trained	0	300 (3%) by March 31, 2011
Decrease the number of violations	Number of violations	385	373 (3%) by March 31, 2011
Decrease the number of terminations	Number of terminations	126	122 (3%) by March 31, 2011

Authorization

The agency requests a modification to previous Attachment C authorizations (for this initiative to include Attachment C: C. 9. b. for the public housing residents).

ONGOING MTW ACTIVITIES

HUD requests two items in this section 1) Specify the Plan Year in which activities continued from the prior plan year(s) were first identified and implemented and 2) Describe if the Agency is using outside evaluators. CHA would like to address both items here in order to avoid duplicity for each ongoing MTW activity reported below. 1) CHA established a chart in the Introduction section that identifies the Ongoing MTW activities, the Plan Year in which they were first identified and the implementation stage and 2) CHA is working with the University of North Carolina at Chapel Hill Center for Urban and Regional Studies to design an evaluation to measure the impact of the authority's Moving Forward program. The evaluation is in a very preliminary stage and no reports on individual initiatives are available. A complete description of the evaluation is in the Administrative section.

INCREASE HOUSING CHOICE INITIATIVES

1. Continued Activity

All components of the Site-Based Waiting Lists for Public Housing and Project-Based Section 8 activity were approved and implemented during the 2008 – 2009 fiscal year. CHA established site based waiting lists for Public Housing in May 2008 and Project Based Section 8 in June 2008. This activity relates to the statutory objective to increase housing choices.

Activity Status Update

Maintaining site-based waiting lists allows applicants to choose developments they want to reside in and apply on site. Waiting lists are managed at the site-level. Applicants for Project-Based Section 8 units sign up at the property level for housing units. Project Based Section 8 applicants are not taken from the Authority's master Section 8 waiting list. With site based waiting lists, applicants will receive three offers before they are taken off all the lists they may have signed up for. By virtue of choice of 27 properties, as opposed to first available, CHA has determined that the change in operations has effectively increased the housing opportunities for families receiving rental subsidy.

There were 1,580 clients removed from the centralized waiting list in the period of April 2007-March 2008. The baseline is set at 49 (3%) for the total clients removed for either not responding to the manager's offer or declining the manager's offer. The other 1,531 were removed for various other reasons (not responding to site selection packet, failing to update application, failing to attend preliminary, criminal history, found housing elsewhere). CHA is working with our software vendor, Yardi, to make programming changes to track the number of site based waiting list participants who accept the first offer (which is their first choice). CHA will work with our partners to establish tracking of site based waiting list for Project Based Section 8. It was apparent during the transition from master to site-base waitlist management that the

choice of housing location is important. Many applicants consciously selected units in smaller sites and in better locations even though the unit availability at these sites would not be as high as other sites, resulting in longer wait times. A negative aspect of the site based waiting list is the increased administrative burden on site managers. Site managers are now responsible for taking applications and checking the system for previous offers to persons on the waiting list when a slot at their site becomes open.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

This activity will be ongoing and no changes, modifications or additions to Attachment C authorizations are anticipated.

ACHIEVE ADMINISTRATIVE EFFICIENCIES

1. Continued Activity

The Charlotte Housing Authority developed a form similar to HUD Form 52646 (Housing Choice Voucher) to allow for more than one extension approval and to incorporate mandated Moving Forward family obligations. The form is titled CHA Housing Choice Voucher. This activity will achieve administrative efficiencies.

Activity Status Update

The HUD form design allowed only one space for an extension. HUD regulation 982.303 states that PHAs may at its discretion develop policy that allows one or more extension of the initial voucher term. The CHA Housing Choice Voucher form allows CHA Section 8 staff to record more than one extension of the voucher to coincide with the CHA Section 8 Administrative Plan. The CHA Housing Choice Voucher form was approved in the Housing Occupancy Plan in July 2009. The use of the HUD Form 52646 is currently addressed in Chapters 8 and 13 of the CHA Administrative Plan as approved March 18, 2008. The current policy states “Extensions may be granted for a period of 30 days, not to exceed a total of 60”. This implies that at least two extensions may be granted and the HUD form is not designed to accommodate this. We will propose new language similar to the following “Extensions may be granted for a period of 30 days, not to exceed a total of 90.” This will allow for a total period of 180 days on the CHA Housing Choice Voucher form.

The Section 8 Department began utilizing the CHA Housing Choice Voucher form October 1, 2009 in PDF format prior to it being uploaded into Yardi. A draft usability survey has also been developed to evaluate the administrative effectiveness of the newly developed form. The baseline for staff modifying the form by hand for each extension is being calculated. The benchmark is to reduce staff time spent on completing extensions.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

There are no changes in the authorization for this initiative.

FINANCIAL INITIATIVES

1. Continued Activity

The **Single Fund Budget with Full Flexibility** was approved for implementation in the 2008 – 2009 MTW Annual Plan. This activity relates to the MTW statutory objective to achieve administrative and cost efficiencies.

Activity Status Update

A single fund budget was established and adopted and approved by CHA Board of Commissioners for the fiscal year 2008-2009. CHA considers this activity complete in regards to the establishment of the activity, but will continue to use the single fund budget with full flexibility. The greatest impact of single fund budget with full flexibility was the provision for CHA to combine funding in order to fund services and initiatives that may have been in jeopardy of delay or deletion. See Table F1 for comparison of the originally approved 2009-2010 budget and the adjusted approved budget as of October 31, 2009. The MTW activities expense by division is detailed in the smaller table accompanying the budget. The illustration below shows the funding gap CHA incurred based on the subsidy requested and actual subsidy received from HUD. With MTW flexibility, CHA was able to cover the gaps in 2008 and 2009.

2007	
\$12,869,122	100% subsidy requested
\$10,732,848	Received 83.40% of subsidy request
\$2,136,274	Unfunded Gap
2008	
\$11,747,214	100% subsidy requested
\$10,450,322	Received 88.96% of subsidy request
\$1,296,892	Gap funded using MTW flexibility
2009	
\$13,032,775	100% subsidy requested
\$11,523,580	Received 88.42% of subsidy requested
\$1,509,195	Gap funded using MTW flexibility

MTW PERFORMANCE MONITORING - FY10 MTW INITIATIVES OCTOBER YTD UPDATE

Table F1

	APRIL 2009-MARCH 2010	APRIL 2009-MARCH 2010
REVENUE	BUDGET	REVISED
Public Housing Operating Subsidy	11,006,553	11,006,553
Section 8 HAP Subsidy	40,169,002	40,169,002
Section 8 Administrative Fees	2,423,639	2,423,639
Capital Fund		4,964,626
Other Income	347,457	347,457
Total MTW Income	53,946,651	58,911,277
Other Sources of Funds		
Appropriate Fund Balance - MTW Funds	16,812,047	23,424,039
Total Other Sources	16,812,047	23,424,039
TOTAL REVENUE	70,758,698	82,335,316
EXPENSES:		
Administrative:	923,013	1,466,544
Tenant And Social Services	176,280	351,280
Implementation of MTW Initiatives	-	4,964,626
TOTAL OPERATING EXPENSES BEFORE OTHER ITEMS:	1,099,293	6,782,450
Other Items:		
Operating Transfers Out - Public Housing	15,917,533	16,123,296
Operating Transfers Out - Capital Fund		5,661,898
Loans To Others		6,205,000
Capital Projects - AMPs	6,024,063	3,989,500
Capital Projects - Real Estate	13,713,271	9,568,634
Operating Transfers Out - Section 8	34,004,538	34,004,538
Total Other Items	69,659,405	75,552,866
TOTAL EXPENSES:	70,758,698	82,335,316

SPENDING BY DIVISION MTW INITIATIVES	
YTD OCTOBER	
EXECUTIVE	639,812
OPERATIONS	693,845
REAL ESTATE	333,194
TOTAL	1,666,851

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

There are no changes in the authorization for this initiative.

2. Continued Activity

HUD approved the request to Adopt an Investment Policy Consistent with North Carolina State Law. CHA adopted investment policies consistent with state law to the extent such policies are in compliance with applicable OMB circulars and other federal laws as a result of HUD approval of the 2008 – 2009 plan. Under this investment policy, CHA shall invest only in securities authorized under state law that will allow the flexibility to invest productively and efficiently. The activity was implemented during the 2008 – 2009 MTW Annual Plan. The activity relates to the MTW statutory objective to achieve administrative and cost efficiencies.

Activity Status Update

The greatest impact of the ability to invest in North Carolina Capital Management Trust was the interest rate achieved on these investments. At the beginning of the quarter, the trust had an interest rate earning that was twice what the agency would have been able to earn otherwise. However by the end of the quarter it was lower than the interest on our checking accounts.

CHA reviewed the 2007-2008 interest rates earned on investments utilized under the current HUD eligible investments by month. The Authority then tracked the 2008-2009 interest rates on similar HUD eligible investments during the year as well as the rates on the new North Carolina governmental entity eligible investments utilized during the year. A summary of these investments and the corresponding achievements is below. The CHA will continue to take advantage of the investment flexibility during the 2010-2011 year. As the interest rates continue to fluctuate on investments, CHA will closely monitor all rates and invest in those securities that will give us the highest earning potential.

Performance Month	HUD Standard interest rate	Achieved interest rate	Additional Interest Earned
Fiscal Year 2009			
October 2008	.92%	2.9%	\$15,422.56
November 2008	.35%	2.5%	\$17,647.41
December 2008	.35%	1.86%	\$12,970.89
January 2009	.35%	1.45%	\$9,530.13
February 2009	.35%	1.08%	\$5,330.25
March 2009	.35%	.97%	\$5,411.58
Fiscal Year 2010			
April 2009	.35%	.85%	\$4,217.23

May 2009	.35%	.70%	\$2,959.10
June 2009	.25%	.59%	\$2,854.97
July 2009	.25%	.49%	\$1,998.07
August 2009	.25%	.33%	\$724.94
September 2009	.25%	.23%	(\$109.05)
October 2009	.25%	.18%	(\$237.32)
November 2009	.25%	.54%	\$526.99

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

There are no changes in the authorization for this initiative.

INSPECTION AND HQS INITIATIVES

1. Continued Activity

The activity to Modify Section 8 Inspection Procedures was approved by HUD and implemented in the 2008 – 2009 fiscal year. The activity relates to the statutory objective to achieve greater cost efficiencies.

Activity Status Update

CHA proposed and received HUD approval to waive the requirement for an initial Housing Quality Standards (HQS) inspection on newly constructed Project Based Section 8 units and utilize local Building Standard’s inspection and subsequent issuance of a Certificate of Occupancy (CO) as a substitution of the initial or move-in inspection. In FY09, CHA used the waiver on 78 units, resulting in a cost savings of \$3,900. The agency has not had any additional units inspected using this method since the FY 2009 Annual Report. The agency does anticipate using the waiver on 14 new units at Ashley Park multifamily during FY11. Savings of approximately \$50 per unit are expected to be generated as a result of the alternate inspection process for “new-construction – new move-in”.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The agency does not anticipate any changes, modifications, or additions to Attachment C authorizations. The activity is ongoing.

2. Continued Activity

The Section 8 Property Rating System activity was approved and implemented during the 2007 – 2008 Fiscal Year. The activity is related to the statutory objective to expand housing choices.

Activity Status Update

The Section 8 Property Rating System was implemented to increase the housing quality standards of property owners participating in the Section 8 program. The baseline was set at 0 and the benchmark is 800 units per year. CHA has contracted with a local engineering firm, Professional Service Industries (PSI) to develop a quantitative evaluation rating system for the exterior appearance of a property using the City of Charlotte Code Enforcement Standards and U. S. Department of Housing and Urban Development Housing Quality Standards (HQS). PSI conducts an inspection of the exterior of the structure, landscaping, foundation, sidewalk and driveway. Each of the properties from approximately 1,600 landlords will be inspected.

CHA has a system in place to ensure there are no serious problems with unit interiors. CHA has not eliminated or decreased interior inspections of Section 8 properties. HQS inspections continue to be conducted on the interior prior to voucher issuance, during the recertification period and if there are any participant complaints during the lease period. Re-inspections are completed after any failed inspections. The intent of the external inspections is to establish a system that provides a greater level of monitoring and enforcement for problem landlords. There has been 1,791 (362 FY08, 893 FY09, 536 FY10) PSI inspections (maximum potential of 4,268 units) conducted as of November 2009. The initiative goal is to encourage landlords to maintain all properties such that the property receives a rating of C or better. CHA believes that the random exterior inspections will increase housing choices by increasing property conditions to entice more landlords to participate. The property rating baseline will be set after completion of all initial inspections on the voucher properties. The most current rating of the inspections is exhibited in the corresponding chart.

RATINGS CHART	
A	6 (.34%)
B	1134 (63.32%)
C	643 (35.9%)
D	8 (.45%)
F	0

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations. The activity is ongoing.

COMMUNITY BASED RENTAL ASSISTANCE INITIATIVES *(also known as Project Based Section 8)*

1. Continued Activity

The activity, Streamline Community Based Rental Assistance Process, was approved by HUD and implemented in the 2008 – 2009 MTW Annual Plan. The activity relates to the MTW statutory objective to expand housing choices.

Activity Status Update

CHA has adopted a new Community Based Rental Assistance (CBRA) Process in accordance with this MTW Initiative. As described in prior plans, the goal of this initiative is to place as many CBRA units as possible in the following areas:

- “Stable” communities, as defined by the city of Charlotte’s Quality of Life Study
- Neighborhoods with an active revitalization plan

- Neighborhoods along Charlotte’s new transportation corridors, including light rail

CHA established the initial baseline at 228. In FY09 CHA proposed or had 58 in process. The MTW approval for Community Based Rental Assistance (CBRA) allows the Charlotte Housing Authority to produce a volume of CBRA units in any given fiscal year as directed by the Board of Commissioners. In FY10, CHA established a benchmark of 200 CBRA’s, however, in future years, the Commissioners desire to approve allocations on a deal by deal basis. There will not be an annual target.

Community	FY2008 – 2009	Neighborhood Type
McCreesh II	27 PBS8 efficiencies	Transitioning
YWCA Families Together	10 PBS8 2 and 3 BR apartments	Stable
Craig Avenue/Open Door	10 PBS8 1 BR apartments	Stable
Cherry Garden Seniors	11 PBS8 1 and 2 BR apartments	Stable
Total	58	

CHA is working on adding 60 additional Project Based Section 8 units in the Steele Creek development, which received a tax credit allocation in August 2009.

Note: The neighborhood type is established by the Neighborhood Quality of Life study commissioned each year by the City of Charlotte. The study evaluates social, crime, physical and economic conditions in Charlotte’s neighborhoods. More information can be found at <http://www.charmeck.org/Departments/Neighborhood+Dev/Sustain+Neighborhoods/Quality+of+Life/Home.htm>.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

SAFETY INITIATIVES

1. Continued Activity

In the 2009 – 2010 Moving Forward Annual Plan, the Resident Safety Department was approved to implement Resident Safety Initiatives to reduce crime incident statistics for all CHA sites combined by 5% each fiscal year for 5 years. Under Attachment C of CHA’s MTW Amended and Restated Agreement, CHA is eligible to use MTW funds for “the provision of safety, security, and law enforcement measures and activities appropriate to protect residents of housing from crime”. This activity is related to the statutory objective to expand housing choices.

Activity Status Update

There were 965 crimes within CHA properties in 2007. This baseline was established based on crime statistics provided by Charlotte-Mecklenburg Police Department. The Resident Safety Department has implemented a strategic plan which expands the department's crime prevention initiatives and program enforcement initiatives for both CHA public housing sites and Section 8 properties.

Activities to be undertaken in FY11 include:

- Private Security and Security System Upgrades for the Hi-Rise Sites;
- Off Duty Charlotte Mecklenburg Police Department (CMPD) Officers for Family/Cluster Sites;
- Private Armed Security for Boulevard Homes;
- Improved Physical Safety Features at Administrative Buildings;
- Crime Statistics Analyst;
- Specialized Research Software; and
- Survey of Resident Perception of Safety

Initiative	Target	Status
Upgrades Private Security & Security Systems	Provide additional coverage for High-Rise Site Providing Surveillance Cameras for Family Sites	Additional cameras will be installed Ongoing over 3 – 4 year period Surveillance installation at family sites will be begin by Dec 1, 2009 and completed by May 2010
Provide Off-Duty CMPD for Family/Cluster Sites	Reduce number of Part 1** Crime during strategic periods	Repeated at strategic times annually
Physical Safety of Buildings (Administrative)	Provide security coverage for Administrative Office located at Scaleybark	In progress
Boulevard Homes Private Security (Armed)	Provide additional coverage with private security company	Ongoing
Crime Statistics Analyst	Provide Part 1 Crime stats on a monthly basis	Receipt of monthly stats began Aug 2009. Ongoing
Specialized Research Software	Talks with CMPD on who CHA can obtain the software that is being used by CMPD	The status of this initiative will depend on the status of the Crime Statistics Analyst result

**Part 1 crime includes robbery, homicide, rape, serious assault

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

SELF-SUFFICIENCY INITIATIVES

1. Continued Activity

The Currents of Change activity was approved by HUD and implemented during the fiscal year of April 1, 2008 – March 31, 2009. This activity will promote work and self-sufficiency.

Activity Status Update

Currents of Change offers job education and job training programs in 3-tiers based on participant needs. Tiers include basic building blocks, resources needed to enter his/her chosen career and assistance obtaining sustained income and housing independence. CHA collaborates with other service agencies to coordinate the delivery of services for our participants as they take the voyage from dependency to self-sufficiency. This also includes contracted case management due to the volume of families that will be required to participate in Currents of Change.

During FY 2010 CHA posted two Requests for Proposals from providers for contracted case management for both the Boulevard Redevelopment and the Currents of Change Program (PHA wide). The case management providers will be required to incorporate a “phased-in approach” for serving the volume of CHA families.

There are three tracks which will be operating the Currents of Change Program; Track A is CHA’s internal pilot track and contains the Victoria Square and Claremont Communities. Currents of Change programming began in May 2009. Track B is the Boulevard Homes community, which is slated to begin in late fall 2009, and finally Track C, which will be selected communities containing approximately 600 additional families. The communities will be selected through a lottery process. These tracks make up Phase 1. As a result baseline data numbers were adjusted accordingly. As the process continues and families are added to the program, program modifications will more than likely be pursued in order to yield the strongest outcomes during the entire demonstration period.

Able bodied persons who reside in our pilot communities will participate in Currents of Change. A biological-psychological-social (bio-psych-soc) assessment tool is used to identify barriers and opens the doors for dialog and intervention between the household members and case manager. Questions have been sorted into the following categories: Personal Information, Adult Education, Employment, Legal/Financial Literacy, Youth Services, and Health/Wellness. These areas are the main categories which will be tracked. There will be specific emphasis placed on employment, education and youth services.



This uniformed series of questions incorporates the HUD Triage Assessment components which assists case management staff in determining each household's level of need. Goals and outcome measures are then identified and developed in a work plan and the family is referred to known services in the community. As the participant achieves the pre-established benchmarks they are moved to the next level of services. This tiered approach to service delivery provides the participant the motivation necessary to move with the Currents of Change.

Participants of the current FSS program at CHA were moved into the new program at the appropriate levels. Central Piedmont Community College (CPCC) completed an assessment of all families being served by public housing in 2006. The Section 8 household assessment results were received in January 2009. Results of the resident surveys are divided into four tiers.

- **Tier I:** Participants in this category will require more intensive services as they have the most severe and complex problems. The residents in this category will need long term services, intensive counseling and case management to assist them in achieving self-sufficiency. These residents will start their *Currents of Change* journey in the Gateway Program. Participants will be engaged in completion of High School Diploma/GED or Trade School program, interview skills and basic keyboarding in addition to other basic building blocks.
- **Tier II:** Residents enter Tier II once 15 hours of employment is obtained. Participants have at least two primary needs and three or more secondary needs. Residents in this category will need assistance maintaining employment. Life skills and job skills training will be key for this group to become self sufficient. Depending on their employment situation, residents in Tier II will start in the Gateway II program.
- **Tier III:** Residents enter Tier III once 30 hours of employment is obtained. Participants do not have any primary needs and will only need minimal services to keep them informed of job opportunities and ongoing information. There is a low need for life skills training for this group to become self sufficient. These residents will start in Gateway III.
- **Tier IV:** Residents in this category are elderly or disabled. These families continue to need support and may be beyond the ability to live completely self-sufficient. Families with disabled individuals may be precluded from working or may have a family member who requires constant care so that neither the disabled individual nor the caregiver can provide for their own self-sufficient living. The families that may be able to find gainful employment and reach self-sufficiency will be handled on a case by case situation.

A total of three pilot communities will be used during the demonstration, unless otherwise stated, during Phase 1 of the implementation schedule. The pilot program is referred to as Track A. The numbers of participants currently enrolled in the Currents of Change Program by Tier are documented in Table C1. We approximate an addition of 600 families, chosen by lottery, which will be served in Track C during the Phase 1 period. Early assessments indicate an approximate 2% increase in Tier 1, 9% increase in Tier 2 and 30% increase in Tier 3 with the addition of the randomly selected families.

Table C1

Property	Tier 1	Tier 2	Tier 3	Tier 4	
Victoria Square	11	11	2	0	
Claremont	31	9	8	0	SubTotal
Totals:	42	20	10	0	72

The baseline was set at zero (0) since there were no participants in the program when the 2008 – 2009 MTW Annual Plan was approved. The benchmark was to enroll 200 Public Housing and Section 8 families excluding elderly /disabled families by February 2009. At the end of the fiscal year, March 31, 2009, there were 267 persons enrolled in Currents of Change. However, this number included communities who are no longer part of the ongoing Currents of Change program. Table C-2 are the number of participants and categories identified for Track A – Internal Pilot data for the Currents of Change Program during the reporting period of May 2009 – July 2009.

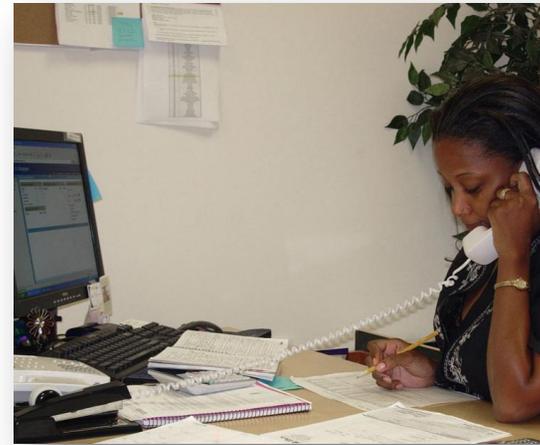
Table C2

Property	Category	Baseline	Annual Benchmark	Outcome FY08	Outcome FY09	Outcome FY10 As of Sept 2009
Track A:						
Victoria Square and Claremont	Enrolled in case management	78	80		78	72
Pilot Start: May 09	Decrease Minimum Renters	26	23 (Year 1: 10%)		26	31
	Increase Working Households	36	40 (Year 1:10%)		36	37
	Employed 15+ Hrs/ Wk (PT)	13	39 (Year 1:50%)		13	16
	Employed 30+ Hrs/ Wk (FT)	23	39 (Year 1:50%)		23	21
	Wage Progression	\$14,664.00	\$15,030.00 (2.5% increase annually)		\$14,664.00	\$10,592.00
	Successful Move Outs of Tier 3	5	8 (Year 1:50%)		5	4
Track B:	Enrolled in case	204	184 (90%)			

	management					
Boulevard Homes	Decrease Minimum Renters	84	76 (Year 1:10%)			
Pending Start December '09	Increase Working Households	58	64 (Year 1:10%)			
	Employed 15+ Hrs/ Wk (PT)	Baseline in development	Year 1:50%			
	Employed 30+ Hrs/ Wk (FT)	Baseline in development	Year 1:50%			
	Wage Progression	\$13,115.00	\$13,443(2.5%/yr)			
	Successful Move Outs of Tier 3	Baseline in development	Year 1:50%			
Track C:	Enrolled in case management	Baseline in development	90% of caseload			
Pending Lottery Selection	Decrease Minimum Renters	Baseline in development	Year 1:10%			
	Increase Working Households	Baseline in development	Year 1:10%			
	Employed 15+ Hrs/ Wk (PT)	Baseline in development	Year 1:50%			
	Employed 30+ Hrs/ Wk (FT)	Baseline in development	Year 1:50%			
	Wage Progression	Baseline in development	2.5%/year			
	Successful Move Outs of Tier 3	Baseline in development	Year 1:50%			

The Currents of Change Program as currently structured cannot serve the large number of households needing education or employment to move forward on a path to self-sufficiency. Therefore, a major component of the program such as case management was re-evaluated. CHA has solicited bids for private case management in order to serve a higher number of residents in greater capacity. CHA still anticipates the entire portfolio will be managed similar to the Family Self-sufficiency model using a Phased in approach.

CHA proposed collecting data through interview assessments and social services databases, as well as modifying the YARDI database to track and maintain detailed records of an individual’s progress. YARDI software modifications are currently in progress to allow CHA to adequately evaluate the effectiveness of the activity in promoting work and self-sufficiency among participants. As of this reporting period, YARDI completed an on-site assessment of departmental needs. YARDI then began building the required infrastructure and tables for case management inputs. Expansion of custom reporting tables and reports are underway, along with creating a procedure manual for all case management entities.



Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

2. Continued Activity

In the 2008-2009 MTW Annual Plan, CHA began a partnership with other agencies to create a Cooperative Agreement that connects CHA participants to programs and services that address truancy, post-secondary education preparation, and academic performance improvement. This activity promotes work and self-sufficiency. The Charlotte Housing Authority is focused on providing services for youth that are assisted by CHA housing programs as a means to help break the cycle of poverty. CHA collaborated with Charlotte-Mecklenburg Schools (CMS), Communities in Schools of Charlotte-Mecklenburg, Inc. (CIS) Partners in Out-of-School Time (POST) and the Charlotte Housing Authority Scholarship Foundation (CHASF) to craft a cooperative agreement that outlines the roles and responsibilities for all partners. The partnership was formed with the following goals in mind:

- Establish and implement a policy to reduce truancy
- Offer youth programs and services that will benefit residents of CHA communities
- Develop and offer post-secondary education preparation for middle and high school students
- Establish a data sharing network that will enable parties to obtain essential data to aid in providing quality service and program development

Activity Status Update

Below are the current status' of the activities involved in this initiative.

1) Truancy

CHA received Board approval for Truancy policy which is in place for the 2009-2010 school year. CHA has received approximately 50% of the releases mailed to families. The releases are needed to identify schools in which CHA children attend and give us the ability to get information from schools.

2) School Programs

CHA finalized a Memorandum of Understanding (MOU) with Communities in Schools (CIS) for 3 site coordinators at South Mecklenburg and West Mecklenburg High Schools, and Sedgefield Middle School. The contract is expected to impact truancy reduction, grade-level achievement, parental-involvement, alternative education (if required). The CHA Youth Services Coordinator monitors the CIS contract and meets periodically with CIS staff.

3) Achievement Academy

Numerous meetings, research and presentations that focus on middle school academic achievement have been conducted by staff. As a result, the research reveals that the funding of this venture (by CHA) for the large number of CHA kids in need of this service was not feasible. The new case management model will look to engage youth with existing community and CMS programs. CHA will continue to look at alternative options for academic achievement programs for CHA youth.

4) Scholarships

The CHA Scholarship Fund (CHASF) offers financial aid and guidance to any young resident under 25 years of age attending or planning to attend college, technical, or vocational school. In 2009, 60 youth were offered scholarships for a total scholarship value of \$120,947.00. Through the community youth partnership, the target is to increase the number of scholarship recipients by providing post-secondary opportunities and mentoring.

5) Out of School Programs

The **mission** of Partners in Out-of-School Time (POST) is to ensure that all school-age children and youth in Mecklenburg County have access to high-quality programs, activities, and opportunities when school is closed. "Out-of-School Time" refers to all of the hours before school, after school, teacher workdays, school holidays, weekends, and summers. **POST's purpose** is to build the capacity of individuals and organizations to provide high-quality out-of-school time programs, activities, and opportunities. POST will assist CHA with connecting youth to neighboring out of school programs. POST is a partner under the same MOU with CHA and CIS referenced above.

6) Mentoring and Tutoring Relationships

Client Services will connect youth to existing community programs in-line with our goals for youth engagement, however, the best practices in which to market, identify, connect and support are still being developed. CHA will lead the collaborative effort with our partners to encourage marketing/recruitment strategies.

Arbor – Inspire reports 9 enrolled from CHA (Section 8 & 9) (goal - 12) and 10 enrolled (goal-15) at Q-Foundation. Engagement can be for 2-years before program exit (so outcomes are delayed) for both programs. In addition, Q Foundation is no longer a receiving the WIA funding for this program, thus outcomes are hindered. CHA in conjunction with its partners are looking at alternative ways to enhance marketing and subsequent participation in these programs. A mass mailing was made to participants notifying them of programs focusing on out-of-school youth: Arbor and Q Foundation. Both programs are no-cost to residents that meet Workforce Investment Act (WIA) income eligibility. Both programs have enrollment limitations per their local contract with funder; once capacity is reached, no addition enrollment can take place. A youth services coordinator has been designated.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

STUDY AND POLICY INITIATIVES

1. Continued Activity

The activity, Participant and Landlord Tracking Program, was approved and implemented in the 2007 – 2008 MTW Annual Plan. This activity relates to the MTW statutory objective to expand housing choices.

Activity Status Update

The Charlotte Housing Authority (CHA) would like to increase fair market rents (FMR) in those areas of Charlotte/Mecklenburg County that have low Section 8 participation in order to address de-concentration of poverty and increase access to affordable housing opportunities in non-concentrated areas. CHA partnered with the University of North Carolina at Charlotte (UNC Charlotte) to use Geographic Information Science (GIS) mapping to identify each voucher holder within Mecklenburg County. The purpose of the GIS mapping was to identify areas within Mecklenburg County with Section 8 voucher holders. Further analysis is needed through a housing market study to determine reasonable fair market rents in Charlotte/Mecklenburg County in order to adjust FMR's to pursue de-concentration efforts and establish justifiable FMR's. Participants will also receive education in order to help them locate affordable housing in stable neighborhoods as defined by social, crime, physical, and economic conditions. CHA will seek a vendor to conduct a housing market analysis in order to determine appropriate FMR's for Mecklenburg County. In the event that the housing study results in FMR's that exceed 120% of HUD's FMR, a waiver

is requested for the 120% cap. Therefore, modification of the authorization is required. The additional authorization in Attachment C is D. 2. a., D. 7. c. iii.

The contract for the service for the GIS mapping was executed in November 2007 and the database collection began in December 2007. Results from the study indicated that 3,206 vouchers in the Housing Choice Voucher program are concentrated in eight (8) out of twenty-eight (28) zip codes in Charlotte, NC (28205, 28208, 28212, 28213, 28216, 28217, 28215 and 28269). 4140 vouchers are currently utilized out of 4415. Of the total number of vouchers utilized, 77% of the voucher holders reside within the eight (8) concentrated zip codes. Our FY 2010-2011 benchmark will be to conduct a housing analysis to justify the establishment of CHA FMR's in order to reduce vouchers within the eight (8) concentrated zip codes by 6% (200) and expand vouchers in the remaining 29 zip codes in Mecklenburg County.

	Baseline	FY 2011 Benchmark
Concentrated Zip Codes	3,206 (77%) voucher holders	3,000* (73%) voucher holders
Non-Concentrated Zip Codes	934 (23%) voucher holders	1,134* (27%) voucher holders

*Subject to change based on the utilization rate

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

2. Continued Activity

CHA received approval to implement the Development of Local Design Standards activity in the 2008 – 2009 MTW Annual Plan. CHA adopted local design standards that correlate with other funding sources available in Charlotte and the state - primarily those of the North Carolina Housing Finance Agency.

Activity Status Update

This activity is related to the administrative efficiencies statutory objective. It eliminates the need to expend funding on multiple architectural reviews to ensure that various requirements are met. The activity will impact the way CHA does business since the NCHFA (www.NCHFA.org) standards are subject to a statewide public review and comment process each year to ensure that they meet changing building guidelines and local standards. As a state agency authorized to expend federal funds, the NCHFA guidelines meet all applicable federal requirements. In the previous fiscal year, CHA achieved the benchmark of development of the local design standards. The outcome as to whether the initiative actually meets the statutory objective in greater cost effectiveness in federal expenditures will be discussed when utilization has occurred and differences can be noted.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

UNIT PRODUCTION INITIATIVES

1. Continued Activity

The initiative, Use Single Fund Funding Flexibility To Develop Additional Units, was approved and implemented in the 2008 – 2009 MTW Annual Plan. These units will primarily be in mixed income developments and will be developed directly with CHA as developer or in partnership with other qualified affordable housing developers. The activity is related to the MTW statutory objective to expand housing choices.

Activity Status Update

A key real estate initiative involves using block grant funding to leverage financing for the development of additional affordable housing units. The units will be developed in a way that supports the overall goals of de-concentration of poverty and in locations that support our residents’ efforts to move up and out of public housing. CHA did not defer or eliminate any PHA activities to develop additional units. CHA planned new units utilizing its asset repositioning strategy and leverage from various federal, state and local resources (tax credits, HTF, etc.). The goal is to produce on average, 100 units of new or rehabilitated affordable housing units each year of the Moving Forward program.

The baseline was set at zero for this unit production initiative. The benchmark goal was to add 100 new or rehabilitated affordable housing units financed through MTW funding. CHA reported 110 units acquired and converted in the FY 09 Annual Report. There are no additions at this time. CHA had planned to move much more aggressively into apartment acquisitions to take advantage of opportunities in the current market with the use of MTW funds. While HUD’s approval of the new TDC formula was a good step, CHA will need the requested approval of an exception or waiver of the “pro rata” rule to make significant increases in production through apartment acquisition. Strategies to acquire additional units include Neighborhood Revitalization Apartment Unit Acquisition Program, Neighborhood Stabilization National Legislative Program, Capital Fund Financing Program (CFFP), and Interim Construction Loans and/or Bridge Loans that are subject to TDC or Proportionality.

Last year, due to the availability of CFRC, CHA delayed the use of the CFFP in combination with tax exempt bonds, 4% tax credits, capital funds, MTW and City Housing Trust Fund monies to complete a substantial rehabilitation of two seniors towers. Funding was received for Charlottetown Terrace. In FY 2011, CHA does plan to use the CFFP as described for the Parktowne (163) and Strawn (196) towers. Built in 1977 and 1970 respectively, these towers are structurally sound and located in Charlotte’s booming Uptown area and Southpark. They are

accessible to public transportation and a wide range of services. The plan is to apply for demolition/disposition using the new streamlined process (which has not yet been released by HUD) to allow for the transfer of the buildings to LLC's assemble financing and begin rehabilitation in late 2010. At this time, we plan to complete renovations floor by floor, upgrading systems and making all changes outlined in the most recent capital needs plan. In addition, we have planned a significant upgrade for the exterior of the buildings, making them more compatible with the new development planned around them and improving livability for the resident seniors and persons with disabilities.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

2. Continued Activity

CHA received approval to implement Increasing The Acquisition/Rehabilitation of Existing Multi-Family Properties, in the 2008 – 2009 MTW Annual Plan.

Activity Status Update

In light of rising construction costs and in the face of continued Not In My Backyard (NIMBY) opposition to affordable housing development in higher income areas of Charlotte, CHA proposes that a key component of the unit production portion of the Moving Forward Plan would be driven by an aggressive acquisition/rehabilitation program. In anticipation of MTW status, CHA successfully negotiated a \$5 million acquisition line of credit agreement with Fifth-Third Bank. CHA will be tracking the impact of the activity on the cost effectiveness and increasing housing choices for low income families' objectives.

Because this is a production program, the baseline at the beginning of CHA's MTW Agreement was set at zero (0). The benchmark was to add 50 rehabilitated units per year as part of the overall agency goal to produce 100 units per year through new construction and rehabilitation. CHA will use the same units in the Single Fund Funding Flexibility to Develop Additional Units as done the previous fiscal year. In FY09, CHA achieved significant cost savings in the acquisition of Fairmarket Square (\$48,667 per unit) and Seneca Woods (\$71,059 per unit) compared to the \$120,000 per unit for new construction. Additionally, 110 units were produced. For FY10, CHA's goal was 400 units. CHA currently has 4 acquisitions under consideration: Little Rock Apartments (242) – which is critical to the success of the Boulevard Homes Hope VI; Woodlawn House (104); McMullen Woods (55); and Hampton Creste (239).

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

3. Continued Activity

The activity, Develop a Unit Production Program with Charlotte-Mecklenburg Schools, was approved and implemented in the 2008 – 2009 MTW Annual Plan. This activity will meet the statutory objective to expand housing choices.

Activity Status Update

During the first year of Moving Forward, the Real Estate Division began exploring a partnership with Charlotte-Mecklenburg Schools (“CMS”) to produce mixed income affordable housing units at school sites. This was a pioneering initiative for Charlotte because CMS has had to purchase larger pieces of property than was required for the school development. CHA proposed offsetting the cost and use of the excess land by partnering to develop mixed income rental housing on site. In the FY09 Annual Report CHA achieved its benchmark to identify one site that will be feasible for CHA/CMS development. CMS board passed a resolution to build a school at the redeveloped Boulevard Homes site. Unfortunately, with the recession and consequent shortfall in the County budgets, CMS is experiencing a 15% cut in funding, which has caused the lay-offs of several hundred teachers. In that environment, CMS did not feel it could make financial commitments to affordable housing in this budget year. They again expressed their desire to continue to work on identifying sites to work in partnership with CHA in future years, post –recession.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

4. Continued Activity

CHA received approval to implement this activity, Land Acquisition for Future Affordable Housing Development Use, in the 2008 – 2009 MTW Annual Plan, and pursued the activity as stated in the Plan.

Activity Status Update

It is very important to CHA’s overall MTW plan to secure as many good locations as possible along the new transit corridors and light rail and in rapidly developing areas of Charlotte to expand housing choices. Charlotte is in a stage of very rapid growth and waiting to purchase these sites until full project financing is in place will mean the loss of key opportunities to build housing for our residents in the best locations with the best amenities to support their efforts at self-sufficiency. Therefore, CHA requested and was approved for the ability to option and purchase land (or sites appropriate for demolition and/or rehab) without funded development plans in place. CHA will certify that it has met the HUD Site Selection Standards. CHA also plans to set forth for HUD approval proposed criteria under which it would be allowed to purchase property in excess of appraised value (to gain site control in a rapidly gentrifying area, etc.).

The baseline was set at zero and staff tracked location and cost of acreage added as well as projected plans for development. The goal to acquire one site in the first two years of MTW program operation was achieved. CHA closed on vacant land at Krefeld Drive during the 3rd quarter FY2008-2009. The multi-family site will accommodate 99 units. Krefeld was 10 acres at \$900k or 90K/acre. CHA has several

additional land acquisitions under consideration. The benchmark going forward will be to acquire one site at least every two years which will provide a development opportunity of a minimum of 50 units.

Anticipation of Changes, Modification, or Additions to Attachment C Authorizations

The Agency does not anticipate any changes, modifications, or additions to Attachment C authorizations.

COMPLETED INITIATIVES

1. This activity, ***Affordable Housing Impact Study***, was approved and implemented in the 2007 – 2008 MTW Annual Plan. CHA commissioned University of North Carolina at Charlotte (UNCC) to design a research program to examine the impact of affordable housing on neighboring property owners and the surrounding community. The local social and economic data and geographic information science (GIS) technology was used to create the framework for examining the pattern and density of affordable housing and measure the association between this housing stock and crime rates, housing and property values, and school equity in surrounding residential communities.

The Affordable Housing Impact Studies initiative is complete. UNC Charlotte utilized the most recent property values data, including sales information from the Mecklenburg County Property Tax Office, crime statistics from the Charlotte-Mecklenburg Police Department, and Charlotte-Mecklenburg Schools achievement data. The final study results were presented to the Charlotte Housing Authority Board of Commissioners in June 2008.

The Affordable Housing Impact Studies is related to the statutory objective to expand housing choices for low-income families and individuals. In Charlotte, Section 8 participants have historically been concentrated in high poverty neighborhoods. This initiative enhances the availability of affordable housing in existing residential communities with lower-poverty, where a higher quality of life exists and opportunities to escape poverty are greater.

By analyzing this data, low-income families will be afforded the opportunity to have information that will aid in making decisions about desired areas that are impacted in the community. This should yield increased housing choices by families. During the briefings and Good Neighbors Training, CHA informs families of areas that are not concentrated with Section 8 vouchers. Through the voucher clustering tracking in the Participant and Landlord tracking initiative, CHA will be able to note increases in areas outside of the high concentrated areas.

The baseline for this initiative was set at zero (0). The benchmark was the receipt of three final reports: 1) Section 8 Households and the Relationship to Crime in Charlotte, NC 2) Section 8 Households and the Relationship to Property Values in Charlotte, NC 3) School Quality and Affordable Housing in Charlotte, NC: A Spatial Assessment. The final presentations on the study results were presented to the Charlotte Housing Authority Board of Commissioners in June 2008.

Cumulatively reported, it was stated that overall, the crime data indicated that there was little evidence to support the perception that Section 8 households impact the property crime rates in surrounding neighborhoods. Furthermore, there was weak evidence that Section 8 households impact property values. It was noted that property values are influenced by multiple factors (property location, housing unit characteristics, neighborhood demographics, foreclosures, and neighborhood change). However, the overall impact is less than other neighborhood characteristics, homeownership, foreclosure, age of housing and proximity to center city. Findings from the school equity data indicate that increased property values and declining proportions of affordable housing stock have reduced the access to better quality neighborhood schools. The benchmarks were achieved and the activity has been determined to be effective based on the final three reports distributed to the Greater Charlotte Community.

CHA will use these findings to refute opposition to the Section 8 program participants in Charlotte communities. These findings have been recited to the Charlotte-Mecklenburg Chief of Police, Charlotte City Council and Neighborhood Associations.

The authorization which gives CHA the flexibility to establish payment standards between 90 percent of fair market rental (FMR) and 120 percent of 120 FMR by census tract instead of HUD established FMR jurisdiction for the Affordable Housing Program Studies is 42 U.S.C 1437f(o)(1)(B) and corresponding regulations at 24 C.F.R. § 982.503 (c) (2).

The waiver is necessary to achieve the benchmark because it reduces the concentration of vouchers in certain census tracts in Charlotte, increases housing choices for low-income families.

2. CHA implemented the HUD approved **Assess Section 8 Program Participants** activity in the 2008 – 2009 MTW Annual Plan. CHA completed the assessment of the Section 8 participants’ needs in June 2008. The survey assessment was conducted and analyzed by Central Piedmont Community College’s (CPCC) Center for Applied Research. The assessment was a key planning component to determine the types of services and programs families will need to assist them in becoming self-sufficient. The assessments measured the families’ capacity to live independent of a housing subsidy. The Section 8 participants will be enrolled in the Currents of Change program where work plans for each able bodied, non elderly/disabled person will be developed to address self-sufficiency needs.

By assessing the needs of the families CHA has the data needed to develop targeted programs, services and policies that will aid families in their quest to become self-sufficient. Thus far, 81% of all Section 8 participants have been assessed. As a result of the assessments, CHA realizes there are a number of needs families have to becoming self-sufficient. Below is an abstract of the needs survey:

- 62.1% of respondents wanted computer training
- 46.3% of respondents wanted job training



- 55.2% of respondents wanted help to attend college
- 49.1% of respondents wanted help finding a job or a different job
- 30.2% of respondents wanted help getting their GED
- 10.1% of respondents wanted help learning to read

Based on the percentage of needs identified above, CHA will phase in a new service delivery model with community partners that will serve a greater number of participants than current staffing levels can accommodate. In addition, the scope of services will be expanded to assist participants in being self reliant.

The baseline was set at zero (0). This was an initial assessment. CHA had 4,260 authorized Section 8 vouchers (HCV) of which CHA's benchmark was to survey 80% or 3,425 program participants by December 2008. After the survey was administered, CHA realized that the 128 Project-Based Section 8 families and 525 seniors/disabled needed to be removed from the survey resulting in a total of 3,607 Section 8 vouchers participants. CHA adjusted the 80% number to reflect the deducted households, bringing the benchmark to 2,886. As of December 2008, 3,294 or 91% of the participants have responded to the survey either online or through mail. Therefore, CHA has exceeded the targeted benchmark of 80%.

The benchmark was achieved and the activity was determined effective since there was an overwhelming response to the survey. Completion of the survey allowed CHA to see the volume of participants that needed assistance to move toward self-sufficiency, as well as the diverse needs of this population.

The proposed metrics included an initial letter and survey which were mailed June 2008 to all Section 8 households. A reminder post card was mailed the first and third week of August 2008. The survey consisted of 46 questions focused on Employment and Education, Family Responsibilities, Health, and Elderly and Disabled Residents in order to evaluate their capacity for independent living. The metric was deemed appropriate because it was the most efficient manner to reach the participants, and they had the opportunity to respond either by mail or online. Final analysis of the survey responses were presented by CPCC to the CHA Board of Commissioners in November 2008. The survey results indicated that the Section 8 participants primary needs are transportation, childcare and more education/training. This ensures that CHA's future activities incorporate strategies addressing these needs to facilitate their progress toward self reliance.

Attachment C: Section E: Authorizations Related to Family Self-sufficiency - The Agency is authorized to operate any of its existing self-sufficiency and training programs, including its Family Self-Sufficiency (FSS) Program and any successor programs exempt from certain HUD program requirements. *This authorization waives certain provisions of Section 23 of the 1937 Act and 24 C.F.R. 984 as necessary to implement the Agency's Annual MTW Plan.*

The waiver was necessary to apply the programs to all participants as opposed to voluntary participation.

SOURCES AND USES OF FUNDING

List planned sources (Operating, Capital, HCV) and uses of MTW funds.

The planned sources (Operating, Capital, HCV) and uses of MTW funds is attached as Appendix C.

List planned sources and uses of State or local funds.

CHA lists the planned sources and used of State and local funds in Appendix D.

If applicable, list planned sources and uses of the COCC.

CHA lists planned sources and uses of the COCC in Appendix C.

If using a cost allocation or fee-for-service approach that differs from 1937 Act requirements, describe the deviations and the reasons therefore.

The use of cost allocation or fee-for-service approach that differs from 1937 Act requirements is not applicable.

List or describe use of single-fund flexibility, if applicable, describe uses across traditional program lines or special circumstances in support of an MTW activity.

CHA describes the use of single-fund flexibility uses across traditional program lines or special circumstances in support of an MTW activity in Appendix C.

Optional – List reserve balances at beginning of the Plan year.

CHA opts out of listing reserve balances at beginning of the Plan year.

Optional – In Plan Appendix, provide planned sources and uses by AMP.

CHA opts out of providing planned sources and uses by AMP.

The University of North Carolina at Chapel Hill's Center for Urban and Regional Studies will be measuring the impact of the Charlotte Housing Authority's Moving Forward Program. The information from the evaluation will help the CHA make mid-course corrections in their initiatives, address the questions and concerns raised about the MTW program by others in the Charlotte community, and provide HUD with the information on the impact of the CHA's MTW program. The evaluation will also help inform other PHA's who may be considering similar innovations. The proposed evaluation will address all of the required elements of the HUD evaluation guidelines, but it will also address CHA's activities that do not require MTW flexibility. This broader scope will provide a more holistic picture the activities that the CHA is undertaking to achieve the goals of the MTW program. The evaluation will be guided by a series of "models of change" that the Center for Urban and Regional Studies will develop in collaboration with CHA staff. The models of change approach will help identify the appropriate output and outcome indicators needed to gauge the programs accomplishments (such as increases in hourly wage rates, and decreases in the need for public subsidy) and it will help in making explicit connections between the components of the MTW program (such as the introduction of work requirements) and the output and outcome indicators.

When CHA became an MTW agency and at the start of the evaluation, it was realized that the Attachment B format, as well as the activities being implemented required reporting requirements, which were not present in our current application software in an easily readable format. Our software, Yardi Systems Inc., has great capabilities for generating reports from many different stored data tables within our database structure. Many reports had to be run in order to get the necessary data pulled from the database. In order to have less reports run and have them in a user friendly, easy readable format, CHA developed 14 new reports for our software vendor to write. All reports had specifications developed, were reviewed, approved and sent to our software vendor. The reports are in the process of being written and are scheduled for delivery in December of 2009.

In further evaluations for other departments reporting requirements to support their MTW initiatives, additional reports and data collection were identified. More than 75 reports and several data table elements are expected to be created. A consultant company, Lupine Partners, will be conducting a detail department review for all reporting and data collection. They will be responsible for specification development of each report and filter criteria's and write the necessary reports. They will deliver the reports which will be placed into our Yardi application.

Both of these actions will allow the CHA to effectively monitor and report on the achievements and accomplishments of the MTW program.

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**Annual Moving to Work Plan
Certifications of Compliance**

**U.S. Department of Housing and Urban
Development**

Office of Public and Indian Housing

**Certifications of Compliance with Regulations:
Board Resolution to Accompany the Annual Moving to Work Plan**

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the PHA fiscal year beginning April 1, 2010, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

1. The PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the PHA and conducted a public hearing to discuss the Plan and invited public comment.
2. The Agency took into consideration public and resident comment before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan;
3. The PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
4. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identify any impediments to fair housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.
5. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
6. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
7. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
8. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
9. The PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.
10. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
11. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
12. The PHA will provide HUD or the responsible entity any documentation that the Department needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58.
13. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.

APPENDIX A

14. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.

15. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.

16. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments.).

17. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.

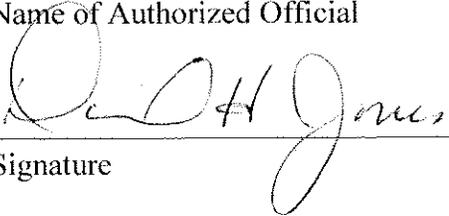
18. All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its Plan and will continue to be made available at least at the primary business office of the PHA.

Housing Authority of the City of Charlotte
PHA Name

NC003
PHA Number/HA Code

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

David H. Jones
Name of Authorized Official


Signature

Board of Commissioners Chairperson
Title

January 8, 2010
Date

Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Applicant Name

Housing Authority of the City of Charlotte

Program/Activity Receiving Federal Grant Funding

Moving To Work Demonstration Program

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

- (1) The dangers of drug abuse in the workplace;
- (2) The Applicant's policy of maintaining a drug-free workplace;
- (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
- (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

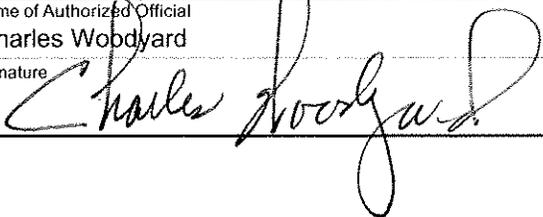
- (1) Abide by the terms of the statement; and
- (2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
 - e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;
 - f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---
 - (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;
 - g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

2. Sites for Work Performance. The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

Check here if there are workplaces on file that are not identified on the attached sheets.

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

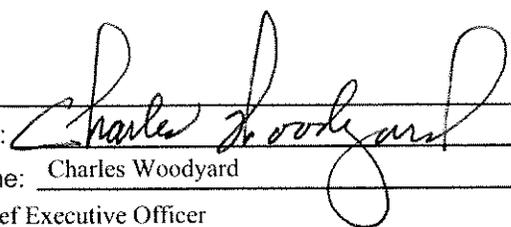
Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official Charles Woodyard	Title Chief Executive Officer
Signature X 	Date 1/5/10

DISCLOSURE OF LOBBYING ACTIVITIES

Approved by OMB
0348-0046

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

1. Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. Status of Federal Action: <input checked="" type="checkbox"/> NA a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. Report Type: <input type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change For Material Change Only: year _____ quarter _____ date of last report _____
4. Name and Address of Reporting Entity: <input type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, if known: Congressional District, if known: 4c	5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime: N/A Congressional District, if known:	
6. Federal Department/Agency: U.S. Department of Housing and Urban Development	7. Federal Program Name/Description: CFDA Number, if applicable: _____	
8. Federal Action Number, if known:	9. Award Amount, if known: \$ N/A	
10. a. Name and Address of Lobbying Registrant <i>(if individual, last name, first name, MI):</i>	b. Individuals Performing Services <i>(including address if different from No. 10a)</i> <i>(last name, first name, MI):</i>	
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature:  Print Name: Charles Woodyard Title: Chief Executive Officer Telephone No.: 704.336.5221 Date: 1/5/10	
Federal Use Only:	Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)	

APPENDIX B

PUBLIC HEARING/RESIDENT COMMENTS DOCUMENTATION

The public hearing for the Moving Forward Annual Plan was held on Tuesday, November 17, 2009 at the CHA Central Office located at 1301 South Boulevard. The following public hearing/resident comments were stated and documented.

Speaker: Lord Nacep, 2600 Booker Avenue, Charlotte NC 28216

Mr. Nacep stated that he was concerned with the vagueness of self sufficiency in terms of the Ross Program. He wanted to know the number of family members in training and what type of educational programs CHA had. He also inquired about CHA's exploration of the Harlem Children's Zone. What is it, what tactics did CHA get out of this exploration, how much has been spent on the exploration and where are the study results to see what model CHA will undertake. Mr. Nacep asked how we are getting public housing residents ready for self sufficiency. He noted that he is a strong proponent of vocational skills and there is a need for programs for those who will not go to college. He referenced his idea for teaching residents to sew. It is a low cost program that could use the space of one of the units to teach 60 women/girls every 60 days. Mr. Nacep also mentioned he had received a certification in whole house weatherization in a 3 day training program and stated CHA should look at specialized skills training for residents. He remarked that NC is going green and CHA should look at opportunities for residents in that area. He further inquired about the Charlotte Housing Authority Scholarship funds in terms of how much is in the funds and who received the funds and where is the training manual for Occupancy Training. He also wanted to know why the housing authority is using block grant funds outside of Section 8 even though he sees it in the booklet that it is to enhance properties, he still wants more information. Mr. Nacep closed asking that he be referred to a supervisor to answer many of the questions he had.

Mr. Nacep was referred to the Deputy Chief of Operations, Cheryl Campbell, to address his questions. The number of family members and types of programs for those in the self sufficiency programs was provided in the Currents of Change information in the FY11 Annual Plan. The amount of scholarships and the number of recipients were specified in the Cooperative Agreement (Youth Initiatives) section of the FY11 Annual Plan. The MTW Coordinator, Gwen Isley, had previously met with Mr. Nacep regarding his proposal for a sewing class. CHA's Assistant Director of Client Services, Chris Campbell, had initiated follow up with Mr. Nacep regarding the sewing class proposal prior to the hearing.

In addition to the public hearing, staff held several meetings with residents and participants to discuss the initiatives described in the plan and provided an overview of the planning process for the upcoming fiscal year. Feedback received includes:

- *Explore the Section 8 homeownership program*
- *Need for Daycare assistance*
- *Work with the Department of Social Services to keep benefits from decreasing as soon as the client reports increase in income*
- *Provide training for jobs that earn more than minimum wage*
- *Allow a broader use of the bus passes.*

CONSOLIDATED BUDGET SOURCES & USES

The Operating Budgets for the fiscal year 2010-2011 for the Charlotte Housing Authority are based on 1) the Authority's strategic plan, 2) the corporate Scorecard 3) the Moving Forward Annual Plan and 4) HUD's directive for project based management, accounting and budgeting.

MISSION

To develop, lead and execute community-wide strategies that meet the broad range of housing needs for families who cannot otherwise attain conventional housing.

Strategic Goals

In order to accomplish our vision and mission, the following strategic goals have been established to transform the Authority into the type of real estate entity that more effectively meets the community's needs.

Strategic Goal #1: Provide affordable housing solutions from homelessness to permanent housing through sustainable strategic partnerships.

Strategic Goal #2: Maximize the economic, physical, and social value of our real estate portfolio.

Strategic Goal #3: Ensure that the Authority attains long-term financial viability.

Strategic Goal #4: Provide the highest quality, cost-effective real estate services that integrate client families into the community's mainstream.

Strategic Goal #5: Create an environment that encourages client families to reach their highest potential.

In the following section, the consolidated budget for the Charlotte Housing Authority is presented. This consolidated budget is broken down into its major funds.

APPENDIX B

SOURCES OF FUNDS

The full Moving To Work (MTW) agreement was approved and signed by HUD in December 2007. Under the single fund budget with full flexibility all funds from HUD, Public Housing- Section 9, Section 8 and the Capital Fund are combined as MTW funding. Money is then transferred from the MTW fund to cover all eligible cost under Section 8, Section 9 and the Capital fund. In some funds other income may be shown such as late fees, non dwelling rental income, or fraud recovery. HUD issued new directives for the flow of funds, however those directives were issued very late in our budget process and the budget was adopted under our current method. The budget will be amended to follow the HUD directives.

USES OF FUNDS

The uses of funds in many aspects are the same for all funds. The uses are broken down by major categories- administrative, tenant and social services, utilities, maintenance, protective services and general. There are 227.8 budgeted positions for the 2010-2011 fiscal year. In 2009-2010, total budgeted positions were 216.3 and during the year 7.5 positions were added. For 2010-2011 4 positions have been added. The increase in staff is most prominent in the Section 8 area with the addition of 3 staff members in 2010-2011. This increase in staff was necessary to adequately staff the Authority.

Administrative represents those expenses for salaries/benefits for central office, site managers and Section 8 staff and sundry expenses such as - telephones, office supplies and training.

Tenant and Social Services represents those cost associated with staff that provides case management to our residents. Those costs also include salary/benefits, sundry expenses relocation cost as well as tenant education.

Utilities represent the cost of all utilities including water/sewer, electricity and gas.

Maintenance represents all cost associated with maintenance of the properties. Staff salaries, materials and outside contract services such a pest control and lawn care.

Protective Services represents all cost associated with security for the CHA.

Other General represents those costs for insurance- auto and property, PILOT and bad debt.

APPENDIX B

CONSOLIDATED BUDGET

EXHIBIT A.1

SOURCES OF FUNDS	April 2010 - March 2011
Public Housing Operating Subsidy	14,015,838
Section 8 HAP Subsidy	41,657,545
Section 8 Operating Subsidy	381,133
Section 8 Administrative Fees	2,183,421
Tenant Rental Revenue	7,497,023
Total Other Resident Income - Late Fees, Excess Utilities	399,026
Other Revenue -Cable, Antenna, Vending	66,377
Capital Fund - MTW	5,113,575
Public Housing Revenues - COCC	1,880,550
Section 8 Fees - COCC	1,158,647
Horizon Development Property, Inc. Fees	359,779
Hoefener Fees - COCC	44,244
Relocation Fees - COCC	668,800
Asset Management Revenue - COCC	60,000
Maintenance Operations Revenue - COCC	474,840
ARRA Management Fee- COCC	450,000
CFRC Management Fee	175,000
MTW Management Fee - COCC	192,480
Mixed Financed Fees – COCC	96,960
Capital Fund Fees – COCC	568,175
Investment Income – COCC	88,000
Administrative Fee – Development Revenue - COCC	1,029,397
Administrative Fees - Portables	175,000
Administrative Fees - Vouchers	75,000
Fraud Recovery - Section 8	150,000
Portable HAP Revenue	2,600,000
Miscellaneous Other Revenue	3,473,908
Total Operating Revenue	85,034,718
<i>Other Sources:</i>	
Operating Transfer In - Other	601,750
Operating Transfer In – First Ward	236,820
Fund Balance Appropriated	407,451
Fund Balance Appropriated- MTW	14,532,603
Total Other Sources	15,778,624
TOTAL SOURCES OF FUNDS:	100,813,342

APPENDIX B

EXHIBIT A.2

USES OF FUNDS	
Administrative:	17,677,885
Tenant and Social Services:	9,053,190
Utilities:	4,372,347
Ordinary Maintenance and Operation:	9,738,394
Housing Assistance Payments	30,600,000
Protective Services	1,262,869
General Expenditures:	4,029,256
Total Expenditures Before Other Items	76,733,941
Capitalized Items	265,608
Total Expenditures	76,999,549
<i>Other Items:</i>	
Capital Projects – AMPS	2,130,701
Capital Projects – Real Estate	19,250,000
Transfer Out – Mixed Finance Communities	2,433,092
Total Other Items	23,813,793
TOTAL USES OF FUNDS	100,813,342

NOTE

The sum of the individual funds for sources and uses (Exhibits B–I) will not tie directly to the consolidated report (Exhibits A.1 and A.2) due to such items as operating transfers.

APPENDIX B

MOVING TO WORK

All funds are consolidated within the MTW fund and transferred to each of the major funds. The expenditures in this fund represent those for the MTW Coordinator and those associated with implementing other MTW initiatives. MTW funds are transferred to the asset management projects for operating subsidy, capital needs and MTW initiatives. Funds are transferred to Section 8 for the operation of the Section 8 program. MTW funds are shown in the Capital Project transfer line item for acquisitions and rehabs for the Real Estate Department.

EXHIBIT B

MTW FUNDS

SOURCES OF FUNDS	April 2010 - March 2011
Public Housing Operating Subsidy	13,755,834
Section 8 HAP Subsidy	41,657,545
Section 8 Administrative Fees	2,183,421
Capital Fund	5,113,575
Other Income	353,380
Total Operating Revenue	63,063,755
<i>Other Sources:</i>	
Fund Balance Appropriated	14,532,603
Total Other Sources	14,532,603
TOTAL SOURCES OF FUNDS	77,596,358
USES OF FUNDS	
Administrative:	1,026,679
Tenant and Social Services:	192,480
TOTAL OPERATING EXPENDITURES:	1,219,159
<i>Other Items:</i>	
Operating Transfers Out - Public Housing	22,374,468
Operating Transfers Out - Section 8	32,622,030
Capital Projects - AMPs	2,130,701
Capital Projects - Real Estate	19,250,000
Total Other Items	76,377,199
TOTAL EXPENDITURES:	77,596,358

APPENDIX B

CENTRAL OFFICE COST CENTER (COCC)

The Central Office Cost Center (COCC) is composed of those departments that provide overall leadership, administrative support and asset management oversight for the organization.

Revenues for the COCC are derived from fees charged to other areas such as Section 9, Section 8 and the Capital Fund as dictated by the asset management rules and regulations. Fees were also charged to the Real Estate Department, the Carol Hoefener Center, those properties owned by the CHA's nonprofit affiliate, Horizon Development Properties, Inc. and fees from the mixed financed communities. The COCC will receive its 10% fee from the ARRA and CRFC grants. As part of the COCC, the CHA has incorporated a City Relocation Program which provides permanent housing solutions for families displaced due to their home being condemned by the City of Charlotte Code Enforcement Department and Fire Department. Total revenue for the COCC is \$7.4 million which is an increase of 23.8% over last year.

Specific areas within the COCC are the chief executive office, chief operations office, asset management, regional property management, fleet management, finance, accounting, procurement, human resources, information technology, city relocation and capital asset administration. Approximately 20% of CHA employees work within the COCC. The maintenance expenditure category represents centralized maintenance services such as bulk trash, plumbing and locksmith services.

Other Uses represents Administrative Fee – Development Revenue to be transferred to Horizon Development Properties, Inc.

APPENDIX B

EXHIBIT C

CENTRAL OFFICE COST CENTER

SOURCES OF FUNDS	April 2010 - March 2011
Public Housing Fees	1,880,550
Section 8 Fees	1,158,647
Horizon Fees	359,778
Capital Fund Fees	568,175
Asset Management Revenue	60,000
Hoefener Fees	44,244
Mixed Finance Fees	96,960
Relocation Income	668,800
Maintenance Operations	474,840
Investment Income	78,000
ARRA Management Fee- COCC	450,000
CFRC Management Fee	175,000
MTW Management Fee	192,480
Administrative Fee – Development Revenue - COCC	1,029,397
Other Income	186,161
Total Operating Revenue	7,423,032
TOTAL SOURCES OF FUNDS	7,432,032
USES OF FUNDS	
Administrative	5,106,395
Tenant and Social Services	317,492
Utilities	54,600
Maintenance	546,399
Other General and Administrative	269,641
Capitalized Items	99,108
Total Operating Expenditures	6,393,635
<i>Other Items:</i>	
Operating Transfer Out - Horizon Development	1,029,397
Total Other Items	1,029,397
TOTAL USES OF FUNDS	7,423,032

APPENDIX B

APPENDIX B

ASSET MANAGEMENT PROJECTS

Budgets are prepared by site managers, because they are responsible for the financial viability of each of their properties. Each property within the AMP is funded at 100% of subsidy. Net tenant rental income is projected to be \$5.0 million. Other revenue consisting of late fees, excess utilities, vending machine, cable, energy conservation savings and antenna revenue. Total revenue is \$31.1 million for 3,054 units by year end.

Of CHA's 227.8 budgeted employees for 2010-2011, 50% work in the public housing sector. This includes those who work directly at the site and those who provide supportive services to our residents.

EXHIBIT D

ASSET MANAGEMENT PROJECTS	
SOURCES OF FUNDS	April 2010 - March 2011
Tenant Rental Revenue	5,035,012
Other Revenue	1,333,689
Total Operating Revenues	6,368,701
Other Sources:	
Operating Transfers In - First Ward Interest	236,820
Operating Transfers In - Other	720,016
Operating Transfers In - MTW	22,374,468
Inter-AMP Excess Cash Transfer In	1,438,257
Total Other Sources:	24,769,561
TOTAL REVENUE:	31,138,262
USES OF FUNDS	
Administrative:	4,689,437
Tenant and Social Services:	6,984,206
Utilities:	3,876,833
Ordinary Maintenance and Operation:	7,543,912
Protective Services	1,067,071
General Expenditures:	2,964,954
Total Expenditures Before Other Items	27,126,413
Capitalized Items:	140,500
Total Expenditures	27,266,913
<i>Other Items:</i>	
Inter-AMP Excess Cash Transfer Out	1,438,257
Transfer Out - Mixed Finance Communities	2,433,092
Total Other Items	3,871,349
TOTAL USES OF FUNDS	31,138,262

APPENDIX B

SECTION 8

Revenues for the Section 8 program are primarily a transfer of funds from the MTW fund to fully fund the Section 8 program. Of this amount, \$30.6 million of the revenue is dedicated to housing assistance subsidy for 4,415 Housing Choice Vouchers. The Section 8 program has revenue of a lesser extent from portable administrative fees, interest income and fraud recovery.

Approximately 84.7% of the expenditure for the Section 8 program is in housing assistance payments. Approximately 21% of the employees of the CHA work in this program. The non dwelling equipment represents the purchase of new vehicles. Protective Services includes staff that investigates fraud.

EXHIBIT E

SECTION 8

SOURCES OF FUNDS	April 2010 - March 2011
Operating Subsidy	381,133
Administrative Fees -Vouchers	75,000
Administrative Fees - Portables	175,000
Interest Income	10,000
Fraud Recovery	150,000
Portable HAP Revenue	2,600,000
Other	88,800
Total Operating Revenue	3,479,933
<i>Other Sources:</i>	
Operating Transfer In - MTW	32,622,030
Total Other Sources	32,622,030
TOTAL SOURCES OF FUNDS	36,101,963
USES OF FUNDS	
Administrative:	4,033,163
Tenant and Social Services:	1,127,529
Ordinary Maintenance and Operation:	90,244
Housing Assistance Payments	30,600,000
Protective Services	195,798
General Expenditures:	29,229
Total Expenditures Before Other Items	36,075,963
Capitalized Items:	26,000
Total Expenditures	36,101,963

APPENDIX B

APPENDIX B

CHANGES IN SOURCES AND USES OF MTW FUNDING

The sources of funding have remained stable utilizing Section 9 and Section 8 funding. We also included as a source of funding the appropriation of fund balance. In the uses section, we have included the \$2 per unit allowable asset management fee from the MTW funds for the Central Office Cost Center. In uses of funding, the transfer to public housing and Section 8 includes money to fund the MTW initiatives. Also more clearly defined are the funding for capital projects at the asset management projects and capital projects for the Real Estate Department for acquisitions and rehabilitations.

HOW FUND FUNGIBILITY IS PLANNED TO BE USED

Fungibility has allowed the CHA to utilize funding to meet the needs of the organization. For example when funding for public housing is prorated, through fungibility of funds, CHA is able to fund public housing properties at 100% of subsidy, provide more funding to capital projects for the Real Estate Department for additional affordable housing and capital projects to the public housing properties for needed replacements. Finally, fungibility has allowed CHA to fund MTW initiatives in compliance with the MTW Annual Plan. All of those items are evidenced in Exhibit B.

APPENDIX D

Charlotte Housing Authority
 Planned Sources and Uses of Funding of State or Local Funds

				Oct-09
State & Local Funding				Remaining
		<u>Grant Award</u>		<u>Funding</u>
<i>NSP Grant</i>		\$ 2,100,000.00		\$ 2,100,000.00
<i>CATS Bus Pass Grant</i>		\$ 100,859.00		\$ 90,609.00
<u><i>Housing Trust Funds</i></u>				
Southside Homes		\$ 4,854,310.00		\$ 182,912.00
Edwin Towers		\$ 649,313.00		\$ 532,151.00
Robinsdale Apartments		\$ 548,366.00		\$ 532,151.00
		\$ 6,051,989.00		\$ 1,247,214.00
Total State & Local Funding		\$ 8,252,848.00		\$ 3,437,823.00

7. Annual Statement/Performance and Evaluation Report**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)****Part I: Summary**

PHA Name:		Grant Type and Number		FFY of Grant:	
Housing Authority of the City of Charlotte		Capital Fund Program Grant No: NC19P00350110		2010	
Original Annual Statement Performance and Evaluation Report for Period Ending:		Replacement Housing Factor Grant No:			
		Revised Annual Statement (revision no:) Final Performance and Evaluation Report			
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	TOTAL NON-CGP FUNDS				
2	1406 OPERATIONS	\$0			
3	1408 MANAGEMENT IMPROVEMENTS	\$0			
4	1410 ADMINISTRATION	\$551,625			
5	1411 AUDIT	\$0			
6	1415 LIQUIDATED DAMAGES	\$0			
7	1430 FEES AND COSTS	\$0			
8	1440 SITE ACQUISITION	\$0			
9	1450 SITE IMPROVEMENTS	\$0			
10	1460 DWELLING STRUCTURES	\$0			
11	1465.1 DWELLING EQUIPMENT-NONEXPENDABLE	\$0			
12	1470 NONDWELLING STRUCTURES	\$0			
13	1475 NONDWELLING EQUIPMENT	\$0			
14	1485 DEMOLITION	\$0			
15	1490 REPLACEMENT FOR RESERVE	\$0			
16	1492 MOVING TO WORK DEMOSTRATION	\$4,964,626			
17	1495.1 RELOCATION COSTS	\$0			
18	1499 DEVELOPMENT ACTIVITIES	\$0			
19	1501 COLLATERIZATION OF DEBT SERVICE	\$0			
20	1502 CONTINGENCY	\$0			
21	AMOUNT OF ANNUAL GRANT (SUM OF LINES 2-19)	\$5,516,251	\$0	\$0	\$0
22	Amount of line 21 Related to LBP Activities	0	0	0	0
23	Amount of line 21 Related to Section 504 Compliance	0	0	0	0
24	Amount of line 21 Related to Security - Soft Costs	0	0	0	0
25	Amount of line 21 Related to Security - Hard Costs	0	0	0	0
26	Amount of line 21 Related to Energy Conservation Measures	0	0	0	0
Signature of President/CEO and Date					

APPENDIX F Annual Statement/Performance and Evaluation Report nc003b01

**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Table**

Capital Fund Grant Number: **NC19P00350109** FFY of Grant Approval: **10/2010** 2010

Revision # NC19P00350110

HA Name: HOUSING AUTHORITY OF THE CITY OF CHARLOTTE

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost	Total Actual Cost		Status of Work
					Funds Obligated	Funds Expended	
ADMINISTRATION	10% Contribution to Central Office Cost Center	1410	LS	\$551,625			
MOVING TO Work	Moving to Work Demonstration	1492	LS	\$4,964,626			
GRANT TOTAL				\$5,516,251			
Signature of President/CEO and Date							

Annual Statement/Performance and Evaluation Report
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
 Part III: Implementation Schedule

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

PHA NAME: Housing Authority of the City of Charlotte NC19P00350110				Grant Type 2010 Capital Fund Program #NC19P00350110			Federal FY of Grant: 2010
DEVELOPMENT #/NAME HA WIDE ACTIVITIES	Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
<p>Omit this Page</p> <p>All items Included in MTW</p> <p>Capital Projects or Initiatives</p>							
			0				

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

Signature of President/CEO and Date

Signature of Public Housing Director/Office of Native American Programs
 Administrator and Date

**APPENDIX F 2010-2011 Capital Project Schedule
(per Capital Needs Assessment)**

"UPDATED AS OF 10/13/2009"

Site Name	Work Item	Replacement Year	Estimated Cost
Autumn Place	Range	2010	\$33,574
Autumn Place	Replace commercial water heater 80 MBH	2011	\$3,907
Autumn Place	Replace truck	2011	\$17,000
Autumn Place Total			\$54,481
Charlottetown	Replace vehicle - Service Coord.	2011	\$16,000
Charlottetown	Replace on-call van	2011	\$20,000
Charlottetown Total			\$36,000
Claremont	Replace vinyl treads on wood stairs	2009	\$19,250
Claremont	Pressure wash existing masonry	2010	\$8,910
Claremont	Range Hood ductless	2010	\$5,635
Claremont	Remove & replace 4' wide concrete sidewalk	2010	\$2,723
Claremont	Remove and replace 4-foot chain link fence	2010	\$8,168
Claremont	Install bath room vanities(50)	2011	\$12,500
Claremont	Repair cracked and missing stone retaining wall, mortar set	2011	\$1,675
Claremont	Structural Follow-up Study	2010	\$3,693
Claremont	Replace Vinyl siding w/Hardi plank		\$356,367
Claremont Total			\$418,920
Dillehay Courts	Asphalt shingles, removal and replacement of shingles	2010	\$198,000
Dillehay Courts	Clean furnace ducts	2010	\$35,870
Dillehay Courts	Stabilize and point brick wall first floor	2010	\$2,000
Dillehay Courts	Pressure wash existing masonry	2010	\$5,569
Dillehay Courts	Erosion Control, seeding, etc	2010	\$30,000
Dillehay Courts	Extend Iron fence behind Bellefonte Dr	2010	\$15,000
Dillehay Courts Total			\$286,439
Edwin Towers	Install ground fault circuit interrupters in kitchens and bathrooms	2009	\$491
Edwin Towers	Replace Windows (246 w/crane)		\$217,000
Edwin Towers	Replace kitchen wall cabinets (1700 lf)	2011	\$203,520
Edwin Towers	Replace kitchen base cabinets & countertops (1841 lf)	2011	\$294,560
Edwin Towers	Replace kitchen sinks & p-trap (175)	2011	\$17,500
Edwin Towers	Paint interior (175)	2011	\$148,750
Edwin Towers	Replace Appliances (175)	2011	\$157,500
Edwin Towers Total			\$1,039,321
Gladedale	ADA - Install signage indicating Van Accessible Parking, pole mounted	2010	\$112
Gladedale	Replace furnace add A/C & Pad	2011	\$296,499
Gladedale	Install Interior Handrails (REAC)	2010	\$29,400
Gladedale	Replace vehicle	2011	\$16,000
Gladedale Total			\$342,011
Leafcrest	Modify units for audio/visual compliance	2009	\$3,000
Leafcrest	Add Tot Lot playground in circle	2010	\$8,000
Leafcrest Total			\$11,000
Mallard Ridge	Pressure wash existing masonry	2010	\$23,631
Mallard Ridge Total			\$23,631
Parktowne Terrace	Fire pump Electric 750 GPM 44 HP	2010	\$34,456
Parktowne Terrace	Replace 6' x 3' aluminum window (398m need crane)	2010	\$230,000
Parktowne Terrace	Replace Diesel Generator 150KW	2010	\$54,317

**APPENDIX F 2010-2011 Capital Project Schedule
(per Capital Needs Assessment)**

"UPDATED AS OF 10/13/2009"

Site Name	Work Item	Replacement Year	Estimated Cost
Parktowne Terrace Total			\$318,774
Robinsdale	ADA, install new H/C access ramp, 3' wide, railings both sides	2009	\$2,400
Robinsdale Total			\$2,400
Savanna Woods	Electrical receptacle and plugs	2010	\$3,262
Savanna Woods	Replace Shingle Roofing	2011	\$80,778
Savanna Woods	Replace Appliances (39)& Hoods		\$33,150
Savanna Woods	Replace HVAC in Center	2011	\$7,000
Savanna Woods	Install Interior Handrails (REAC)	2010	\$29,400
Savanna Woods Total			\$153,590
Southside Homes	Add building number at rear of each apartment building	2009	\$9,850
Southside Homes	50-gallon Commercial Gas-fired hot water heater	2010	\$317
Southside Homes	75-gallon Commercial Electric water heater replacement Community Center	2010	\$4,748
Southside Homes	85-gallon Commercial Electric water heater replacement Day Care	2010	\$5,275
Southside Homes	ADA - Install signage indicating Accessible Parking, pole mounted	2010	\$561
Southside Homes	ADA - Install signage indicating Van Accessible Parking, pole mounted	2010	\$112
Southside Homes	ADA - Install signage indicating Van Accessible Parking, wall mounted	2010	\$78
Southside Homes	ADA, Install curb cut, concrete, 6" rise	2010	\$4,875
Southside Homes	ADA, paint accessible parking space	2010	\$870
Southside Homes	ADA, paint van-accessible space with signage	2010	\$232
Southside Homes	Add parking spaces	2010	\$19,781
Southside Homes	Add visual light to door bell or knocker	2010	\$739
Southside Homes	Replace six windows FIC	2010	\$1,583
Southside Homes	Replace on-call van	2011	\$20,000
Southside Homes	Sidewalk Repair/Replacement	2011	\$40,000
Southside Homes Total			\$109,019
Strawn Apartments	Electrical receptacle install GFCI's	2009	\$40,132
Strawn Apartments	Replace leaking shower pans	2009	\$6,875
Strawn Apartments	Mature Tree Removal or major trimming	2010	\$6,000
Strawn Apartments	Replace on-call van	2011	\$20,000
Strawn Apartments	25 PTAC 1-ton units	2010	\$32,500
Strawn Apartments Total			\$105,507
Sunridge	Replace Vinyl siding w/Hardiplank		\$312,872
Sunridge Total			\$312,872
Tall Oaks (Cherry)	Replace Water heaters	2011	\$22,500
Tall Oaks (Cherry)	Range	2010	\$17,500
Tall Oaks (Cherry)	Range Hood vented	2010	\$2,500
Tall Oaks (Cherry)	Refrigerator	2010	\$22,500
Tall Oaks (Cherry) Total			\$65,000
Tall Oaks (Fraizer)	Replace rear exterior railing	2010	\$21,750
Tall Oaks (Fraizer)	Replace furnace add A/C, Pad & duct clean; replace water heater	2011	\$146,450
Tall Oaks (Fraizer) Total			\$168,200
Tarton Hills	Replace vehicle	2011	\$16,000
Tarton Hills	Replace rear exterior railing	2010	\$15,750
Tarton Hills	Replace timber ret.wall @ office	2010	\$1,200

**APPENDIX F 2010-2011 Capital Project Schedule
(per Capital Needs Assessment)**

"UPDATED AS OF 10/13/2009"

Site Name	Work Item	Replacement Year	Estimated Cost
Tarton Hills	Replace furnance add A/C,Pad & duct clean; replace water heater	2011	\$106,050
Tarton Hills Total			\$139,000
Grand Total			\$3,586,165

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #3 Southside	AMP #5 First Ward
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Section 2

ACC Units 7/1/2007			394			132
Additions						
Deletions						
ACC Units 6/30/2008			394			132
Occupied Unit Months						
01 Occupied Units	3,688	3,688	3,688	1,572	1,572	1,572
02 Occupied Units by police			-	-		-
03 New units in funding period		-	-	-	-	-
04 New units - Oct-Dec		-	-	-	-	-
Vacant Unit Months						
05 Mod units	867	867		-	-	
06 Special Use Units	156	156		-	-	
07 Litigation		-		-	-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized	17			12		
Other ACC						
12 Eligible for Asset Repo Fee	-					
13 All Other						
Calculations						
14 Limited Vacancies		17		12		
15 Total Unit Months	4,728	4,728	3,688	1,584	1,584	1,572
16 Resident Participation Units	-		307	-		131
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 369.99			\$ 399.91
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 382.20			\$ 413.11
04 PEL			\$ 1,807,042			\$ 654,366
Utilities Expense Level						
05 PUM Utilities Expense			\$ 152.03			\$ 40.40
06 UEL			\$ 718,798			\$ 63,994
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ 10,457			\$ 26,217
10 Cost of Audit			\$ 4,991			
11 Resident Participation			\$ 7,675			\$ 3,275
12 Asset Management Fee			\$ 18,912			\$ 6,336
13 Information Technology Fee			\$ 9,456			\$ 3,168
14 Asset Repositioning Fee						
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 51,491			\$ 38,996
17 Total Formula Expenses			\$ 2,577,331			\$ 757,356
Formula Income						
01 PUM Formula Income			\$ 115.44			\$ 238.01
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 115.44			\$ 238.01
04 Total Formula Income			\$ 545,800			\$ 377,008
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provisions			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 2,031,531			\$ 380,348
02 Cost of Audit			\$ 4,991			\$ -
03 Formula Amount			\$ 2,031,531			\$ 380,348

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #6 Edwin Towers	AMP #7 Strawn
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Section 2

ACC Units 7/1/2007			175			318
Additions						
Deletions						
ACC Units 6/30/2008			175			318
Occupied Unit Months						
01 Occupied Units	2,073	2,073	2,073	3,781	3,781	3,781
02 Occupied Units by police	12	12	12	12	12	12
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	-	-	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	15	15	15	23	23	23
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		15		23		
15 Total Unit Months	2,100	2,088	2,085	3,816	3,804	3,793
16 Resident Participation Units	-	-	174	-	-	316
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 277.93			\$ 286.20
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 287.10			\$ 295.64
04 PEL			\$ 599,465			\$ 1,124,615
Utilities Expense Level						
05 PUM Utilities Expense			\$ 116.55			\$ 83.90
06 UEL			\$ 243,356			\$ 319,156
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ 18,023			\$ 15,736
09 PILOT			\$ 22,811			\$ 45,884
10 Cost of Audit			\$ 2,206			\$ 4,071
11 Resident Participation			\$ 4,350			\$ 7,900
12 Asset Management Fee			\$ 8,400			\$ 15,264
13 Information Technology Fee			\$ 4,200			\$ 7,632
14 Asset Repositioning Fee			-			-
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 59,990			\$ 96,487
17 Total Formula Expenses			\$ 902,811			\$ 1,540,258
Formula Income						
01 PUM Formula Income			\$ 188.72			\$ 174.97
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 188.72			\$ 174.97
04 Total Formula Income			\$ 394,047			\$ 665,586
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 508,764			\$ 874,672
02 Cost of Audit			\$ 2,206			\$ 4,071
03 Formula Amount			\$ 508,764			\$ 874,672

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #9 Arbor Glen 50	AMP #10 Arbor Glen #1
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Section 2

ACC Units 7/1/2007			29			60
Additions						
Deletions						
ACC Units 6/30/2008			29			60
Occupied Unit Months						
01 Occupied Units	297	297	297	716	716	716
02 Occupied Units by police	-	-	-	-	-	-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	48	48	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	3	-	-	4	-	-
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		3			4	
15 Total Unit Months	348	348	297	720	720	716
16 Resident Participation Units	-	-	25	-	-	60
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 400.62			\$ 317.78
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 413.84			\$ 328.27
04 PEL			\$ 144,016			\$ 236,354
Utilities Expense Level						
05 PUM Utilities Expense			\$ 21.44			\$ 65.66
06 UEL			\$ 7,461			\$ 47,275
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ -			\$ 8,561
10 Cost of Audit			\$ -			\$ 3,910
11 Resident Participation			\$ 625			\$ 1,500
12 Asset Management Fee			\$ 1,392			\$ 2,880
13 Information Technology Fee			\$ 696			\$ 1,440
14 Asset Repositioning Fee			\$ -			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 2,713			\$ 18,291
17 Total Formula Expenses			\$ 154,190			\$ 301,920
Formula Income						
01 PUM Formula Income			\$ 165.67			\$ 160.56
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 165.67			\$ 160.56
04 Total Formula Income			\$ 57,653			\$ 115,603
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 96,537			\$ 186,317
02 Cost of Audit			\$ -			\$ 3,910
03 Formula Amount			\$ 96,537			\$ 186,317

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #11 Boulevard	AMP #12 Dillehay
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Section 2

ACC Units 7/1/2007			300			136
Additions						-
Deletions						-
ACC Units 6/30/2008			300			136
Occupied Unit Months						
01 Occupied Units	3,520	3,520	3,520	1,583	1,583	1,583
02 Occupied Units by police	-		-	-		-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-		-	-	
06 Special Use Units	24	24		12	12	
07 Litigation	-	-		-	-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized	56			37		
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		56		37		
15 Total Unit Months	3,600	3,600	3,520	1,632	1,632	1,583
16 Resident Participation Units	-		293	-		132
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 405.94			\$ 437.76
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 419.34			\$ 452.21
04 PEL			\$ 1,509,624			\$ 738,007
Utilities Expense Level						
05 PUM Utilities Expense			\$ 236.59			\$ 222.46
06 UEL			\$ 851,724			\$ 363,055
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ 46,840			\$ 7,725
09 PILOT			\$ -			\$ -
10 Cost of Audit			\$ 3,794			\$ 1,727
11 Resident Participation			\$ 7,325			\$ 3,300
12 Asset Management Fee			\$ 14,400			\$ 6,528
13 Information Technology Fee			\$ 7,200			\$ 3,264
14 Asset Repositioning Fee						
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 79,559			\$ 22,544
17 Total Formula Expenses			\$ 2,440,907			\$ 1,123,606
Formula Income						
01 PUM Formula Income			\$ 140.13			\$ 158.55
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 140.13			\$ 158.55
04 Total Formula Income			\$ 504,468			\$ 258,754
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 1,936,439			\$ 864,852
02 Cost of Audit			\$ 3,794			\$ 1,727
03 Formula Amount			\$ 1,936,439			\$ 864,852

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

Section 2	AMP #16 Leafcrest / Cedar Knoll / Mallard Ridge			AMP #18 Charlottetowne		
	ACC Units 7/1/2007			132		
Additions			-			-
Deletions			-			-
ACC Units 6/30/2008			132			180
Occupied Unit Months						
01 Occupied Units	1,375	1,375	1,375	2,115	2,115	2,115
02 Occupied Units by police	-		-	12		12
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	182	182		-	-	
06 Special Use Units	-	-		12	12	
07 Litigation		-		-	-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized	27			21		
Other ACC						
12 Eligible for Asset Repo Fee	-					
13 All Other						
Calculations						
14 Limited Vacancies		27			21	
15 Total Unit Months	1,584	1,584	1,375	2,160	2,148	2,127
16 Resident Participation Units	-		115	-		177
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 361.24			\$ 273.09
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 373.16			\$ 282.10
04 PEL			\$ 591,085			\$ 605,951
Utilities Expense Level						
05 PUM Utilities Expense			\$ 190.62			\$ 82.10
06 UEL			\$ 301,942			\$ 176,351
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ 12,647			\$ 17,623
09 PILOT			\$ 274			\$ 26,095
10 Cost of Audit			\$ 1,690			\$ 2,269
11 Resident Participation			\$ 2,875			\$ 4,425
12 Asset Management Fee			\$ 6,336			\$ 8,640
13 Information Technology Fee			\$ 3,168			\$ 4,320
14 Asset Repositioning Fee			\$ -			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 26,990			\$ 63,372
17 Total Formula Expenses			\$ 920,017			\$ 845,674
Formula Income						
01 PUM Formula Income			\$ 235.33			\$ 178.23
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 235.33			\$ 178.23
04 Total Formula Income			\$ 372,763			\$ 382,838
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 547,254			\$ 462,836
02 Cost of Audit			\$ 1,690			\$ 2,269
03 Formula Amount			\$ 547,254			\$ 462,836

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

	AMP #19 Parketowne / Live Oak			AMP #20 Tarlton Hills / Tall Oaks / Savanna Woods		
	Section 2					
ACC Units 7/1/2007			164			149
Additions			-			-
Deletions			-			-
ACC Units 6/30/2008			164			149
Occupied Unit Months						
01 Occupied Units	1,954	1,954	1,954	1,766	1,766	1,766
02 Occupied Units by police	12		12	-		-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-		-	-	
06 Special Use Units	-	-		12	12	
07 Litigation		-		-	-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized	2			10		
Other ACC						
12 Eligible for Asset Repo Fee	384			-		
13 All Other						
Calculations						
14 Limited Vacancies		2		10		
15 Total Unit Months	2,352	1,956	1,966	1,788	1,788	1,766
16 Resident Participation Units			164	-		147
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 270.90			\$ 358.62
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 279.84			\$ 370.45
04 PEL			\$ 547,367			\$ 662,365
Utilities Expense Level						
05 PUM Utilities Expense			\$ 73.98			\$ 208.45
06 UEL			\$ 144,705			\$ 372,709
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ 20,397			\$ 8,708
09 PILOT			\$ 25,032			\$ 4,468
10 Cost of Audit			\$ 2,067			\$ 1,904
11 Resident Participation			\$ 4,100			\$ 3,675
12 Asset Management Fee			\$ 9,408			\$ 7,152
13 Information Technology Fee			\$ 4,704			\$ 3,576
14 Asset Repositioning Fee			\$ 32,508			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 98,216			\$ 29,483
17 Total Formula Expenses			\$ 790,288			\$ 1,064,557
Formula Income						
01 PUM Formula Income			\$ 190.23			\$ 148.82
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 190.23			\$ 148.82
04 Total Formula Income			\$ 372,090			\$ 266,090
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 418,198			\$ 798,467
02 Cost of Audit			\$ 2,067			\$ 1,904
03 Formula Amount			\$ 418,198			\$ 798,467

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

Section 2	AMP #22 Autumn Place / Hall House			AMP #25 Meadow Oaks / Gladedale / Wallace		
	ACC Units 7/1/2007			259		
Additions			-			-
Deletions			-			-
ACC Units 6/30/2008			259			129
Occupied Unit Months						
01 Occupied Units	1,595	1,595	1,595	1,521	1,521	1,521
02 Occupied Units by police	12		12	-		-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-		-	-	
06 Special Use Units	-	-		12	12	
07 Litigation	1,500	1,500			-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized	1			15		
Other ACC						
12 Eligible for Asset Repo Fee	-			-		
13 All Other						
Calculations						
14 Limited Vacancies		1			15	
15 Total Unit Months	3,108	3,096	1,607	1,548	1,548	1,521
16 Resident Participation Units	-		134	-		127
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level				
01 PEL		\$ 267.76		\$ 356.95
02 Inflation Factor		1.03300		1.03300
03 Inflated PEL		\$ 276.60		\$ 368.73
04 PEL		\$ 856,354		\$ 570,794
Utilities Expense Level				
05 PUM Utilities Expense		\$ 112.30		\$ 205.45
06 UEL		\$ 347,681		\$ 318,037
Add-ons				
07 Self-Sufficiency		\$ -		\$ -
08 Energy Loan Amortization		\$ 24,757		\$ 16,765
09 PILOT		\$ 16,672		\$ 1,499
10 Cost of Audit		\$ 3,290		\$ 1,651
11 Resident Participation		\$ 3,350		\$ 3,175
12 Asset Management Fee		\$ 12,432		\$ 6,192
13 Information Technology Fee		\$ 6,216		\$ 3,096
14 Asset Repositioning Fee				\$ -
15 Changes in law, etc.		\$ -		\$ -
16 Total Add-ons		\$ 66,717		\$ 32,378
17 Total Formula Expenses		\$ 1,270,752		\$ 921,209
Formula Income				
01 PUM Formula Income		\$ 186.46		\$ 111.29
02 PUM Change in Utility Allow		-		-
03 PUM Adj Formula Income		\$ 186.46		\$ 111.29
04 Total Formula Income		\$ 577,280		\$ 172,277
Other Formula Provisions				
01 Moving to work		-		-
02 Transition Funding				
03 Other				
04 Total Other Formula Provis		\$ -		\$ -
Calculation of Formula Amount				
01 Formula Calculation		\$ 693,472		\$ 748,932
02 Cost of Audit		\$ 3,290		\$ 1,651
03 Formula Amount		\$ 693,472		\$ 748,932

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #28 Sunridge/Robinsdale/Claremont/Vic Sq			AMP #30 The Park at Oaklawn		
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Section 2

ACC Units 7/1/2007			156			89
Additions			-			
Deletions			-			
ACC Units 6/30/2008			156			89
Occupied Unit Months						
01 Occupied Units	1,810	1,810	1,810	1,051	1,051	1,051
02 Occupied Units by police	-	-	-	-	-	-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	36	36	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	26	-	-	17	-	-
Other ACC						
12 Eligible for Asset Repo Fee	-	-	-	-	-	-
13 All Other	-	-	-	-	-	-
Calculations						
14 Limited Vacancies	-	26	-	17	-	-
15 Total Unit Months	1,872	1,872	1,810	1,068	1,068	1,051
16 Resident Participation Units	-	-	151	-	-	88
Special Provision for Utilities						
17 Unit Months	-	-	-	-	-	-

Section 3

Project Expense Level						
01 PEL			\$ 340.33			\$ 369.67
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 351.56			\$ 381.87
04 PEL			\$ 658,120			\$ 407,837
Utilities Expense Level						
05 PUM Utilities Expense			\$ 178.19			\$ 75.68
06 UEL			\$ 333,572			\$ 80,826
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ 1,306			\$ -
09 PILOT			\$ 262			\$ 13,551
10 Cost of Audit			\$ 1,978			\$ 4,813
11 Resident Participation			\$ 3,775			\$ 2,200
12 Asset Management Fee			\$ 7,488			\$ 4,272
13 Information Technology Fee			\$ 3,744			\$ 2,136
14 Asset Repositioning Fee			\$ -			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 18,553			\$ 26,972
17 Total Formula Expenses			\$ 1,010,245			\$ 515,635
Formula Income						
01 PUM Formula Income			\$ 126.30			\$ 139.85
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 126.30			\$ 139.85
04 Total Formula Income			\$ 236,434			\$ 149,360
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding			-			-
03 Other			-			-
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 773,811			\$ 366,275
02 Cost of Audit			\$ 1,978			\$ 4,813
03 Formula Amount			\$ 773,811			\$ 366,275

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #31 Rocky Branch II	AMP #32 Arbor Glen II
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Section 2

ACC Units 7/1/2007			20			40
Additions						
Deletions						
ACC Units 6/30/2008			20			40
Occupied Unit Months						
01 Occupied Units	240	240	240	478	478	478
02 Occupied Units by police	-	-	-	-	-	-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	-	-	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	-	-	-	2	-	-
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		-			2	
15 Total Unit Months	240	240	240	480	480	478
16 Resident Participation Units	-	-	20	-	-	40
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 338.54			\$ 356.32
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 349.71			\$ 368.08
04 PEL			\$ 83,930			\$ 176,678
Utilities Expense Level						
05 PUM Utilities Expense			\$ 40.11			\$ 54.53
06 UEL			\$ 9,626			\$ 26,174
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ -			\$ 7,113
10 Cost of Audit			\$ -			\$ 3,850
11 Resident Participation			\$ 500			\$ 1,000
12 Asset Management Fee			\$ 960			\$ 1,920
13 Information Technology Fee			\$ 480			\$ 960
14 Asset Repositioning Fee			\$ -			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 1,940			\$ 14,843
17 Total Formula Expenses			\$ 95,496			\$ 217,695
Formula Income						
01 PUM Formula Income			\$ 83.92			\$ 165.05
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 83.92			\$ 165.05
04 Total Formula Income			\$ 20,141			\$ 79,224
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 75,355			\$ 138,471
02 Cost of Audit			\$ -			\$ 3,850
03 Formula Amount			\$ 75,355			\$ 138,471

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #33 Mayfield Terrace (Nia Point)	AMP #35 Arbor Glen III
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Section 2

ACC Units 7/1/2007			29			12
Additions						
Deletions						
ACC Units 6/30/2008			29			12
Occupied Unit Months						
01 Occupied Units	345	345	345	144	144	144
02 Occupied Units by police	-	-	-	-	-	-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	-	-	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	3	-	-	-	-	-
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		3			-	
15 Total Unit Months	348	348	345	144	144	144
16 Resident Participation Units	-	-	29	-	-	12
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 349.25			\$ 356.08
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 360.78			\$ 367.83
04 PEL			\$ 125,551			\$ 52,968
Utilities Expense Level						
05 PUM Utilities Expense			\$ 58.17			\$ 46.47
06 UEL			\$ 20,243			\$ 6,692
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ 5,261			\$ 1,625
10 Cost of Audit			\$ 3,133			\$ 1,690
11 Resident Participation			\$ 725			\$ 300
12 Asset Management Fee			\$ 1,392			\$ 576
13 Information Technology Fee			\$ 696			\$ 288
14 Asset Repositioning Fee			\$ -			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 11,207			\$ 4,479
17 Total Formula Expenses			\$ 157,001			\$ 64,139
Formula Income						
01 PUM Formula Income			\$ 138.91			\$ 162.33
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 138.91			\$ 162.33
04 Total Formula Income			\$ 48,341			\$ 23,376
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 108,660			\$ 40,763
02 Cost of Audit			\$ 3,133			\$ 1,690
03 Formula Amount			\$ 108,660			\$ 40,763

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #37 Seigle 60 (McAden Park)	AMP #38 Stonehaven
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Section 2

ACC Units 7/1/2007			30			24
Additions						
Deletions						
ACC Units 6/30/2008			30			24
Occupied Unit Months						
01 Occupied Units	358	358	358	284	284	284
02 Occupied Units by police	-	-	-	-	-	-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	-	-	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	2	-	-	4	-	-
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		2			4	
15 Total Unit Months	360	360	358	288	288	284
16 Resident Participation Units	-	-	30	-	-	24
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 348.31			\$ 303.95
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 359.98			\$ 313.98
04 PEL			\$ 129,528			\$ 90,426
Utilities Expense Level						
05 PUM Utilities Expense			\$ 33.18			\$ 52.00
06 UEL			\$ 11,945			\$ 14,976
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ 18,106			\$ -
10 Cost of Audit			\$ -			\$ -
11 Resident Participation			\$ 750			\$ 600
12 Asset Management Fee			\$ 1,440			\$ 1,152
13 Information Technology Fee			\$ 720			\$ 576
14 Asset Repositioning Fee			\$ -			\$ -
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 21,016			\$ 2,328
17 Total Formula Expenses			\$ 162,489			\$ 107,730
Formula Income						
01 PUM Formula Income			\$ 163.26			\$ 182.14
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 163.26			\$ 182.14
04 Total Formula Income			\$ 58,774			\$ 52,456
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 103,715			\$ 55,274
02 Cost of Audit			\$ -			\$ -
03 Formula Amount			\$ 103,715			\$ 55,274

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

	AMP #39 Montgomery Gardens			AMP #40 Prosperity Creek		
Section 2						
ACC Units 7/1/2007				20		
Additions				72		
Deletions						
ACC Units 6/30/2008				20		
Occupied Unit Months				72		
01 Occupied Units	238	238	238	864	864	864
02 Occupied Units by police	-	-	-	-	-	-
03 New units in funding period	-	-	-	-	-	-
04 New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months						
05 Mod units	-	-	-	-	-	-
06 Special Use Units	-	-	-	-	-	-
07 Litigation	-	-	-	-	-	-
08 Disasters	-	-	-	-	-	-
09 Casualty Loss	-	-	-	-	-	-
10 Changing Market Condition	-	-	-	-	-	-
11 Vacant, not categorized	2	-	-	-	-	-
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		2			-	
15 Total Unit Months	240	240	238	864	864	864
16 Resident Participation Units	-	-	20	-	-	72
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL		\$ 331.83			\$ 250.41	
02 Inflation Factor		1.03300			1.03300	
03 Inflated PEL		\$ 342.78			\$ 258.67	
04 PEL		\$ 82,267			\$ 223,491	
Utilities Expense Level						
05 PUM Utilities Expense		\$ 55.15			\$ 25.74	
06 UEL		\$ 13,236			\$ 22,239	
Add-ons						
07 Self-Sufficiency		\$ -			\$ -	
08 Energy Loan Amortization		\$ -			\$ -	
09 PILOT		\$ 2,050			\$ 34,511	
10 Cost of Audit		\$ 2,275			\$ -	
11 Resident Participation		\$ 500			\$ 1,800	
12 Asset Management Fee		\$ 960			\$ 3,456	
13 Information Technology Fee		\$ 480			\$ 1,728	
14 Asset Repositioning Fee		\$ -			\$ -	
15 Changes in law, etc.		\$ -			\$ -	
16 Total Add-ons		\$ 6,265			\$ 41,495	
17 Total Formula Expenses		\$ 101,768			\$ 287,225	
Formula Income						
01 PUM Formula Income		\$ 143.80			\$ 138.62	
02 PUM Change in Utility Allow		-			-	
03 PUM Adj Formula Income		\$ 143.80			\$ 138.62	
04 Total Formula Income		\$ 34,512			\$ 119,768	
Other Formula Provisions						
01 Moving to work		-			-	
02 Transition Funding		-			-	
03 Other		-			-	
04 Total Other Formula Provis		\$ -			\$ -	
Calculation of Formula Amount						
01 Formula Calculation		\$ 67,256			\$ 167,457	
02 Cost of Audit		\$ 2,275			\$ -	
03 Formula Amount		\$ 67,256			\$ 167,457	

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #41 South Oak Crossing	AMP #42 Springfield Gardens
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Section 2

ACC Units 7/1/2007			20			22
Additions						
Deletions						
ACC Units 6/30/2008			20			22
Occupied Unit Months						
01 Occupied Units	22	22	22	264	264	264
02 Occupied Units by police			-			-
03 New units in funding period	218	218	218		-	-
04 New units - Oct-Dec	30	30	30		-	-
Vacant Unit Months						
05 Mod units		-			-	
06 Special Use Units		-			-	
07 Litigation		-			-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized						
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		-			-	
15 Total Unit Months	270	270	270	264	264	264
16 Resident Participation Units	-		23	-		22
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL		\$ 297.18			\$ 346.40	
02 Inflation Factor		1.03300			1.03300	
03 Inflated PEL		\$ 306.99			\$ 357.83	
04 PEL		\$ 82,887			\$ 94,467	
Utilities Expense Level						
05 PUM Utilities Expense		\$ 45.80			\$ 34.59	
06 UEL		\$ 12,366			\$ 9,132	
Add-ons						
07 Self-Sufficiency		\$ -			\$ -	
08 Energy Loan Amortization		\$ -			\$ -	
09 PILOT		\$ -			\$ 1,998	
10 Cost of Audit		\$ -			\$ -	
11 Resident Participation		\$ 575			\$ 550	
12 Asset Management Fee		\$ 1,080			\$ 1,056	
13 Information Technology Fee		\$ 540			\$ 528	
14 Asset Repositioning Fee		\$ -			\$ -	
15 Changes in law, etc.		\$ -			\$ -	
16 Total Add-ons		\$ 2,195			\$ 4,132	
17 Total Formula Expenses		\$ 97,448			\$ 107,731	
Formula Income						
01 PUM Formula Income		\$ 143.80			\$ 165.36	
02 PUM Change in Utility Allow		-			-	
03 PUM Adj Formula Income		\$ 143.80			\$ 165.36	
04 Total Formula Income		\$ 38,826			\$ 43,655	
Other Formula Provisions						
01 Moving to work		-			-	
02 Transition Funding						
03 Other						
04 Total Other Formula Provis		\$ -			\$ -	
Calculation of Formula Amount						
01 Formula Calculation		\$ 58,622			\$ 64,076	
02 Cost of Audit		\$ -			\$ -	
03 Formula Amount		\$ 58,622			\$ 64,076	

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #44 940 Brevard	AMP #45 Seigle Point Apartments
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Section 2

ACC Units 7/1/2007			-			-
Additions			40			102
Deletions						
ACC Units 6/30/2008			40			102
Occupied Unit Months						
01 Occupied Units		-	-		-	-
02 Occupied Units by police			-			-
03 New units in funding period	480	480	480	1,155	1,155	1,155
04 New units - Oct-Dec	112	112	112	157	157	157
Vacant Unit Months						
05 Mod units		-			-	
06 Special Use Units		-			-	
07 Litigation		-			-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized						
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		-			-	
15 Total Unit Months	592	592	592	1,312	1,312	1,312
16 Resident Participation Units			49			109
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 263.29			\$ 367.43
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 271.98			\$ 379.56
04 PEL			\$ 161,012			\$ 497,983
Utilities Expense Level						
05 PUM Utilities Expense			\$ 25.74			\$ 52.28
06 UEL			\$ 15,238			\$ 68,591
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ -			\$ -
10 Cost of Audit			\$ -			\$ -
11 Resident Participation			\$ 1,225			\$ 2,725
12 Asset Management Fee			\$ 2,368			\$ 5,248
13 Information Technology Fee			\$ 1,184			\$ 2,624
14 Asset Repositioning Fee						
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 4,777			\$ 10,597
17 Total Formula Expenses			\$ 181,027			\$ 577,171
Formula Income						
01 PUM Formula Income			\$ 165.09			\$ 195.25
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 165.09			\$ 195.25
04 Total Formula Income			\$ 97,733			\$ 256,168
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 83,294			\$ 321,003
02 Cost of Audit			-			-
03 Formula Amount			\$ 83,294			\$ 321,003

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #46 Springcroft at Ashley Park	AMP #48 McAlpine Terrace Apartments
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Section 2

ACC Units 7/1/2007			-			-
Additions			18			26
Deletions						
ACC Units 6/30/2008			18			26
Occupied Unit Months						
01 Occupied Units		-	-		-	-
02 Occupied Units by police			-			-
03 New units in funding period	193	193	193	164	164	164
04 New units - Oct-Dec		-	-		-	-
Vacant Unit Months						
05 Mod units		-			-	
06 Special Use Units		-			-	
07 Litigation		-			-	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized						
Other ACC						
12 Eligible for Asset Repo Fee						
13 All Other						
Calculations						
14 Limited Vacancies		-			-	
15 Total Unit Months	193	193	193	164	164	164
16 Resident Participation Units			16			14
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 249.46			\$ 249.46
02 Inflation Factor			1.03300			1.03300
03 Inflated PEL			\$ 257.69			\$ 257.69
04 PEL			\$ 49,734			\$ 42,261
Utilities Expense Level						
05 PUM Utilities Expense			\$ 28.81			\$ 25.73
06 UEL			\$ 5,560			\$ 4,220
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ -
09 PILOT			\$ -			\$ -
10 Cost of Audit			\$ -			\$ -
11 Resident Participation			\$ 400			\$ 350
12 Asset Management Fee			\$ 772			\$ 656
13 Information Technology Fee			\$ 386			\$ 328
14 Asset Repositioning Fee						
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 1,558			\$ 1,334
17 Total Formula Expenses			\$ 56,852			\$ 47,815
Formula Income						
01 PUM Formula Income			\$ 153.50			\$ 203.74
02 PUM Change in Utility Allow			-			-
03 PUM Adj Formula Income			\$ 153.50			\$ 203.74
04 Total Formula Income			\$ 29,626			\$ 33,413
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 27,226			\$ 14,402
02 Cost of Audit			-			-
03 Formula Amount			\$ 27,226			\$ 14,402

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy Requests

AMP #49 Glen Cove Apartments	Total AMPS
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Section 2

ACC Units 7/1/2007			-			3,091
Additions			10			196
Deletions						-
ACC Units 6/30/2008			10			3,287
Occupied Unit Months						
01 Occupied Units		-	-	33,654	33,654	33,654
02 Occupied Units by police			-	60		60
03 New units in funding period	110	110	110	2,320	2,320	2,320
04 New units - Oct-Dec		-	-	299	299	299
Vacant Unit Months						
05 Mod units		-		1,049	1,049	
06 Special Use Units		-		312	312	
07 Litigation		-		1,500	1,500	
08 Disasters	-	-		-	-	
09 Casualty Loss	-	-		-	-	
10 Changing Market Condition	-	-		-	-	
11 Vacant, not categorized				299		
Other ACC						
12 Eligible for Asset Repo Fee				384		
13 All Other						
Calculations						
14 Limited Vacancies		-			299	
15 Total Unit Months	110	110	110	39,877	39,433	36,333
16 Resident Participation Units			9			3,030
Special Provision for Utilities						
17 Unit Months		-			-	

Section 3

Project Expense Level						
01 PEL			\$ 345.42			
02 Inflation Factor			1.03300			
03 Inflated PEL			\$ 356.82			
04 PEL			\$ 39,250			\$ 13,645,795
Utilities Expense Level						
05 PUM Utilities Expense			\$ 40.30			
06 UEL			\$ 4,433			\$ 4,935,313
Add-ons						
07 Self-Sufficiency			\$ -			\$ -
08 Energy Loan Amortization			\$ -			\$ 190,527
09 PILOT			\$ -			\$ 272,447
10 Cost of Audit			\$ -			\$ 51,309
11 Resident Participation			\$ 225			\$ 75,750
12 Asset Management Fee			\$ 440	159,508		\$ 159,508
13 Information Technology Fee			\$ 220			\$ 79,754
14 Asset Repositioning Fee			\$ -			\$ 32,508
15 Changes in law, etc.			\$ -			\$ -
16 Total Add-ons			\$ 885			\$ 861,803
17 Total Formula Expenses			\$ 44,568			\$ 19,442,911
Formula Income						
01 PUM Formula Income			\$ 244.22			
02 PUM Change in Utility Allow			-			
03 PUM Adj Formula Income			\$ 244.22			
04 Total Formula Income			\$ 26,864			\$ 6,410,928
Other Formula Provisions						
01 Moving to work			-			-
02 Transition Funding						
03 Other						
04 Total Other Formula Provis			\$ -			\$ -
Calculation of Formula Amount						
01 Formula Calculation			\$ 17,704			\$ 13,031,983
02 Cost of Audit			-			\$ 51,309
03 Formula Amount			\$ 17,704			\$ 13,031,983

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #3 Southside			AMP #5 First Ward			AMP #6 Edwin Towers		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	20,058	1,957,681	164,754	10,978	40,810	56	6,895	2,473,848	-

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	39,823	1,684,202	147,431	10,734	40,001	41	12,565	2,561,848	-
03	Rolling Base Year 2	45,980	1,614,710	190,185	9,940	38,733	48	10,994	2,609,848	-
04	Rolling Base Year 3	44,279	1,540,013	158,386	9,769	43,321	43	12,355	2,975,848	-
05	Total Consumption-Rolling Base	130,082	4,838,925	496,002	30,443	122,055	132	35,914	8,147,544	-
06	Average Rolling Base Consumption	43,361	1,612,975	165,334	10,148	40,685	44	11,971	2,715,848	-
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	43,361	1,612,975	165,334	10,148	40,685	44	11,971	2,715,848	-

Section 4

09	Base Consumption	43,361	1,612,975	164,754	10,148	40,685	44	11,971	2,473,848	-
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	344,706	-	830	125	12	-	-	-
11	Actual < Rolling Base	-	-	580	-	-	-	-	242,000	-
12	75%/25% split	-	86,177	-	208	31	3	-	-	-
13	75%/25% split	-	-	435	-	-	-	-	181,500	-

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	43,361	1,699,152	165,189	10,356	40,716	47	11,971	2,655,348	-

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 122,787	\$ 231,288	\$ 242,913	\$ 53,433	\$ 7,918	\$ 204	\$ 32,331	\$ 154,982	\$ -
17	Actual Average Utility Rate	\$ 6.1216	\$ 0.1181	\$ 1.4744	\$ 4.8673	\$ 0.1940	\$ 3.6429	\$ 4.6891	\$ 0.0626	\$ -

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 265,439	\$ 200,670	\$ 243,555	\$ 50,406	\$ 7,899	\$ 171	\$ 56,133	\$ 166,225	\$ -
19	Charge for Excess Utilities			\$ 52,884			\$ -			\$ -
20	Base Utilities Exp Level less Charges			\$ 656,780			\$ 58,476			\$ 222,358
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 718,780		\$ 63,996				\$ 243,349	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 718,780		\$ 63,996				\$ 243,349	
25	Eligible Unit Months		4,728		1,584				2,088	
26	Utilities Expense Level - PUM		\$ 152.03		\$ 40.40				\$ 116.55	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #7 Strawn			AMP #9 Arbor Glen 50			AMP #10 Arbor Glen #1		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	12,264	3,562,131	-	913	16,450	109	5,399	52,868	456

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	16,345	3,628,420	-	366	14,527	97	5,070	49,979	345
03	Rolling Base Year 2	15,640	3,706,393	-	479	15,972	101	4,604	56,075	607
04	Rolling Base Year 3	15,233	3,611,850	-	552	16,441	97	5,003	45,900	903
05	Total Consumption-Rolling Base	47,218	10,946,663	-	1,397	46,940	295	14,677	151,954	1,855
06	Average Rolling Base Consumption	15,739	3,648,888	-	466	15,647	98	4,892	50,651	618
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	15,739	3,648,888	-	466	15,647	98	4,892	50,651	618

Section 4

09	Base Consumption	15,739	3,562,131	-	466	15,647	98	4,892	50,651	456
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	-	-	447	803	11	507	2,217	-
11	Actual < Rolling Base	-	86,757	-	-	-	-	-	-	162
12	75%/25% split	-	-	-	112	201	3	127	554	-
13	75%/25% split	-	65,068	-	-	-	-	-	-	122

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	15,739	3,627,199	-	578	15,848	101	5,019	51,205	578

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 65,285	\$ 204,120	\$ -	\$ 7,762	\$ 1,707	\$ 280	\$ 29,835	\$ 14,882	\$ 827
17	Actual Average Utility Rate	\$ 5.3233	\$ 0.0573		\$ 8.5012	\$ 0.1038	\$ 2.5688	\$ 5.5260	\$ 0.2815	\$ 1.8136

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 83,783	\$ 207,839	\$ -	\$ 4,914	\$ 1,645	\$ 259	\$ 27,735	\$ 14,414	\$ 1,048
19	Charge for Excess Utilities			\$ -			\$ -			\$ -
20	Base Utilities Exp Level less Charges			\$ 291,622			\$ 6,818			\$ 43,197
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 319,151		\$ 7,462				\$ 47,275	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 319,151		\$ 7,462				\$ 47,275	
25	Eligible Unit Months		3,804		348				720	
26	Utilities Expense Level - PUM		\$ 83.90		\$ 21.44				\$ 65.66	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #11 Boulevard			AMP #12 Dillehay			AMP #16 Leafcrest / Cedar Knoll / Mallard Ridge		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	25,710	2,207,334	183,582	14,964	1,074,347	89,001	6,934	1,342,217	18,929

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	46,116	2,183,420	184,920	20,202	1,040,097	91,633	15,776	1,028,032	16,154
03	Rolling Base Year 2	72,507	2,268,107	208,007	24,628	1,024,337	96,609	20,604	1,634,037	23,119
04	Rolling Base Year 3	60,331	2,123,628	181,762	22,783	877,187	94,249	17,617	1,747,284	27,234
05	Total Consumption-Rolling Base	178,954	6,575,155	574,689	67,613	2,941,621	282,491	53,997	4,409,353	66,507
06	Average Rolling Base Consumption	59,651	2,191,718	191,563	22,538	980,540	94,164	17,999	1,469,784	22,169
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	59,651	2,191,718	191,563	22,538	980,540	94,164	17,999	1,469,784	22,169

Section 4

09	Base Consumption	59,651	2,191,718	183,582	22,538	980,540	89,001	17,999	1,342,217	18,929
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	15,616	-	-	93,807	-	-	-	-
11	Actual < Rolling Base	-	-	7,981	-	-	5,163	-	127,567	3,240
12	75%/25% split	-	3,904	-	-	23,452	-	-	-	-
13	75%/25% split	-	-	5,986	-	-	3,872	-	95,675	2,430

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	59,651	2,195,622	189,568	22,538	1,003,992	92,873	17,999	1,437,892	21,359

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 130,377	\$ 216,429	\$ 303,334	\$ 78,675	\$ 107,314	\$ 138,349	\$ 43,346	\$ 132,396	\$ 30,031
17	Actual Average Utility Rate	\$ 5.0711	\$ 0.0980	\$ 1.6523	\$ 5.2576	\$ 0.0999	\$ 1.5545	\$ 6.2512	\$ 0.0986	\$ 1.5865

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 302,496	\$ 215,171	\$ 313,223	\$ 118,496	\$ 100,299	\$ 144,371	\$ 112,515	\$ 141,776	\$ 33,886
19	Charge for Excess Utilities			\$ 52,647			\$ 31,423			\$ 12,285
20	Base Utilities Exp Level less Charges			\$ 778,243			\$ 331,743			\$ 275,892
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 851,709		\$ 363,060				\$ 301,936	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 851,709		\$ 363,060				\$ 301,936	
25	Eligible Unit Months		3,600		1,632				1,584	
26	Utilities Expense Level - PUM		\$ 236.59		\$ 222.46				\$ 190.62	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #18 Charlottetowne			AMP #19 Parketowne / Live Oak			AMP #20 Tarlton Hills / Tall Oaks / Savanna Woods		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	5,703	1,967,538	-	5,651	1,609,575	-	9,817	1,103,528	93,692

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	8,106	2,063,336	-	8,378	1,648,800	-	15,319	1,068,228	94,948
03	Rolling Base Year 2	7,414	1,968,336	-	8,378	1,610,100	-	28,644	1,105,803	100,017
04	Rolling Base Year 3	8,154	1,935,336	-	8,378	1,527,353	-	19,625	1,014,663	99,584
05	Total Consumption-Rolling Base	23,674	5,967,008	-	25,134	4,786,253	-	63,588	3,188,694	294,549
06	Average Rolling Base Consumption	7,891	1,989,003	-	8,378	1,595,418	-	21,196	1,062,898	98,183
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	7,891	1,989,003	-	8,378	1,595,418	-	21,196	1,062,898	98,183

Section 4

09	Base Consumption	7,891	1,967,538	-	8,378	1,595,418	-	21,196	1,062,898	93,692
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	-	-	-	14,157	-	-	40,630	-
11	Actual < Rolling Base	-	21,465	-	-	-	-	-	-	4,491
12	75%/25% split	-	-	-	-	3,539	-	-	10,158	-
13	75%/25% split	-	16,099	-	-	-	-	-	-	3,368

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	7,891	1,983,637	-	8,378	1,598,957	-	21,196	1,073,056	97,060

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 31,585	\$ 116,402	\$ -	\$ 28,676	\$ 90,265	\$ -	\$ 54,524	\$ 109,099	\$ 148,079
17	Actual Average Utility Rate	\$ 5.5383	\$ 0.0592		\$ 5.0745	\$ 0.0561		\$ 5.5540	\$ 0.0989	\$ 1.5805

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 43,703	\$ 117,431	\$ -	\$ 42,514	\$ 89,701	\$ -	\$ 117,723	\$ 106,125	\$ 153,403
19	Charge for Excess Utilities			\$ -			\$ -			\$ 36,691
20	Base Utilities Exp Level less Charges			\$ 161,134			\$ 132,215			\$ 340,560
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 176,345		\$ 144,696				\$ 372,709	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 176,345		\$ 144,696				\$ 372,709	
25	Eligible Unit Months		2,148		1,956				1,788	
26	Utilities Expense Level - PUM		\$ 82.10		\$ 73.98				\$ 208.45	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #22 Autumn Place / Hall House			AMP #25 Meadow Oaks / Gladedale / Wallace			AMP #28 Sunridge/Robinsdale/Claremont/Vic Sq		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	9,098	2,634,312	54,426	9,358	1,154,109	51,669	16,817	1,400,994	53,891

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	13,407	2,815,026	14,824	13,227	1,134,900	52,824	19,975	1,373,971	56,582
03	Rolling Base Year 2	17,069	2,742,936	66,543	18,136	1,165,329	63,744	17,621	1,433,756	57,934
04	Rolling Base Year 3	15,443	2,852,736	64,063	22,254	1,333,386	54,606	15,826	1,375,840	56,881
05	Total Consumption-Rolling Base	45,919	8,410,698	145,430	53,617	3,633,615	171,174	53,422	4,183,567	171,397
06	Average Rolling Base Consumption	15,306	2,803,566	48,477	17,872	1,211,205	57,058	17,807	1,394,522	57,132
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	15,306	2,803,566	48,477	17,872	1,211,205	57,058	17,807	1,394,522	57,132

Section 4

09	Base Consumption	15,306	2,634,312	48,477	17,872	1,154,109	51,669	17,807	1,394,522	53,891
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	1,340	-	5,949	-	-	-	1,272	6,472	-
11	Actual < Rolling Base	-	169,254	-	-	57,096	5,389	-	-	3,241
12	75%/25% split	335	-	1,487	-	-	-	318	1,618	-
13	75%/25% split	-	126,941	-	-	42,822	4,042	-	-	2,431

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	15,641	2,761,253	49,964	17,872	1,196,931	55,711	18,125	1,396,140	56,322

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 48,398	\$ 161,296	\$ 69,370	\$ 52,602	\$ 112,915	\$ 85,930	\$ 89,356	\$ 144,128	\$ 88,828
17	Actual Average Utility Rate	\$ 5.3196	\$ 0.0612	\$ 1.2746	\$ 5.6211	\$ 0.0978	\$ 1.6631	\$ 5.3134	\$ 0.1029	\$ 1.6483

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 85,023	\$ 168,989	\$ 63,684	\$ 100,460	\$ 117,060	\$ 92,653	\$ 96,305	\$ 143,663	\$ 92,836
19	Charge for Excess Utilities			\$ -			\$ 19,576			\$ 28,000
20	Base Utilities Exp Level less Charges			\$ 317,696			\$ 290,597			\$ 304,804
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 347,687			\$ 318,029			\$ 333,577	
23	Energy Rate Incentive		\$ -			\$ -			\$ -	
24	Utilities Expense Level		\$ 347,687			\$ 318,029			\$ 333,577	
25	Eligible Unit Months		3,096			1,548			1,872	
26	Utilities Expense Level - PUM		\$ 112.30			\$ 205.45			\$ 178.19	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #30 The Park at Oaklawn			AMP #31 Rocky Branch II (Rivermere)			AMP #32 Arbor Glen II		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	11,191	121,994	306	1,112	17,361	176	2,796	29,922	533

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	10,691	120,355	245	1,195	20,498	251	3,117	34,864	278
03	Rolling Base Year 2	12,858	121,306	301	1,195	20,498	251	4,726	28,558	620
04	Rolling Base Year 3	11,001	119,548	251	1,195	20,498	251	4,726	28,558	620
05	Total Consumption-Rolling Base	34,550	361,209	797	3,585	61,494	753	12,569	91,980	1,518
06	Average Rolling Base Consumption	11,517	120,403	266	1,195	20,498	251	4,190	30,660	506
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	11,517	120,403	266	1,195	20,498	251	4,190	30,660	506

Section 4

09	Base Consumption	11,191	120,403	266	1,112	17,361	176	2,796	29,922	506
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	1,591	40	-	-	-	-	-	27
11	Actual < Rolling Base	326	-	-	83	3,137	75	1,394	738	-
12	75%/25% split	-	398	10	-	-	-	-	-	7
13	75%/25% split	245	-	-	62	2,353	56	1,046	554	-

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	11,436	120,801	276	1,174	19,714	232	3,842	30,476	513

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 51,799	\$ 20,549	\$ 640	\$ 5,262	\$ 2,516	\$ 292	\$ 12,494	\$ 6,366	\$ 273
17	Actual Average Utility Rate	\$ 4.6286	\$ 0.1684	\$ 2.0915	\$ 4.7320	\$ 0.1449	\$ 1.6591	\$ 4.4685	\$ 0.2128	\$ 0.5122

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 52,933	\$ 20,343	\$ 577	\$ 5,555	\$ 2,857	\$ 385	\$ 17,168	\$ 6,485	\$ 263
19	Charge for Excess Utilities			\$ -			\$ -			\$ -
20	Base Utilities Exp Level less Charges			\$ 73,853			\$ 8,797			\$ 23,916
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 80,825		\$ 9,627				\$ 26,174	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 80,825		\$ 9,627				\$ 26,174	
25	Eligible Unit Months		1,068		240				480	
26	Utilities Expense Level - PUM		\$ 75.68		\$ 40.11				\$ 54.53	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #33 Mayfield Terrace (Nia Point)			AMP #35 Arbor Glen III			AMP #37 Seigle 60 (McAden Park)		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	3,078	15,260	71	671	12,071	26	2,298	7,155	-

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	-	-	-	630	10,633	22	-	-	-
03	Rolling Base Year 2	-	-	-	630	10,633	22	-	-	-
04	Rolling Base Year 3	-	-	-	630	10,633	22	-	-	-
05	Total Consumption-Rolling Base	-	-	-	1,890	31,899	66	-	-	-
06	Average Rolling Base Consumption	-	-	-	630	10,633	22	-	-	-
07	Actual Consumption - New Units	3,078	15,260	71	-	-	-	2,296	7,155	-
08	Rolling Base Consumption	3,078	15,260	71	630	10,633	22	2,296	7,155	-

Section 4

09	Base Consumption	3,078	15,260	71	630	10,633	22	2,296	7,155	-
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	-	-	41	1,438	4	2	-	-
11	Actual < Rolling Base	-	-	-	-	-	-	-	-	-
12	75%/25% split	-	-	-	10	360	1	1	-	-
13	75%/25% split	-	-	-	-	-	-	-	-	-

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	3,078	15,260	71	640	10,993	23	2,297	7,155	-

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 15,312	\$ 2,998	\$ 186	\$ 3,607	\$ 2,894	\$ 44	\$ 9,973	\$ 944	\$ -
17	Actual Average Utility Rate	\$ 4.9747	\$ 0.1965	\$ 2.6197	\$ 5.3756	\$ 0.2397	\$ 1.6923	\$ 4.3399	\$ 0.1319	\$ -

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 15,312	\$ 2,999	\$ 186	\$ 3,440	\$ 2,635	\$ 39	\$ 9,969	\$ 944	\$ -
19	Charge for Excess Utilities			\$ -			\$ -			\$ -
20	Base Utilities Exp Level less Charges			\$ 18,497			\$ 6,114			\$ 10,913
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 20,243		\$ 6,691			\$ 11,943		
23	Energy Rate Incentive		\$ -		\$ -			\$ -		
24	Utilities Expense Level		\$ 20,243		\$ 6,691			\$ 11,943		
25	Eligible Unit Months		348		144			360		
26	Utilities Expense Level - PUM		\$ 58.17		\$ 46.47			\$ 33.18		

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #38 Stonehaven			AMP #39 Montgomery Gardens			AMP #40 Prosperity Creek		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	1,123	8,643	90	1,480	28,370	35	671	191,211	-

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	1,946	19,084	245	-	-	-	-	-	-
03	Rolling Base Year 2	1,946	19,084	245	-	-	-	-	-	-
04	Rolling Base Year 3	1,946	19,084	245	-	-	-	-	-	-
05	Total Consumption-Rolling Base	5,838	57,252	735	-	-	-	-	-	-
06	Average Rolling Base Consumption	1,946	19,084	245	-	-	-	-	-	-
07	Actual Consumption - New Units	-	-	-	1,480	28,370	35	671	191,211	-
08	Rolling Base Consumption	1,946	19,084	245	1,480	28,370	35	671	191,211	-

Section 4

09	Base Consumption	1,123	8,643	90	1,480	28,370	35	671	191,211	-
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	-	-	-	-	-	-	-	-
11	Actual < Rolling Base	823	10,441	155	-	-	-	-	-	-
12	75%/25% split	-	-	-	-	-	-	-	-	-
13	75%/25% split	617	7,831	116	-	-	-	-	-	-

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	1,740	16,474	206	1,480	28,370	35	671	191,211	-

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 6,954	\$ 1,323	\$ 169	\$ 7,973	\$ 4,006	\$ 115	\$ 3,607	\$ 16,718	\$ -
17	Actual Average Utility Rate	\$ 6.1923	\$ 0.1531	\$ 1.8778	\$ 5.3872	\$ 0.1412	\$ 3.2857	\$ 5.3756	\$ 0.0874	\$ -

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 10,775	\$ 2,522	\$ 387	\$ 7,973	\$ 4,006	\$ 115	\$ 3,607	\$ 16,712	\$ -
19	Charge for Excess Utilities			\$ -			\$ -			\$ -
20	Base Utilities Exp Level less Charges			\$ 13,684			\$ 12,094			\$ 20,319
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 14,976		\$ 13,236				\$ 22,237	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 14,976		\$ 13,236				\$ 22,237	
25	Eligible Unit Months		288		240				864	
26	Utilities Expense Level - PUM		\$ 52.00		\$ 55.15				\$ 25.74	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #41 South Oak Crossing			AMP #42 Springfield Gardens			AMP #44 940 Brevard		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level										
01	Actual Consumption	619	11,415	36	996	14,956	52	-	-	-

Section 3

Rolling Base Consumption Level										
02	Rolling Base Year 1	-	-	-	-	-	-	-	-	-
03	Rolling Base Year 2	-	-	-	-	-	-	-	-	-
04	Rolling Base Year 3	-	-	-	-	-	-	-	-	-
05	Total Consumption-Rolling Base	-	-	-	-	-	-	-	-	-
06	Average Rolling Base Consumption	-	-	-	-	-	-	-	-	-
07	Actual Consumption - New Units	619	11,415	36	996	14,956	52	-	-	-
08	Rolling Base Consumption	619	11,415	36	996	14,956	52	-	-	-

Section 4

09	Base Consumption	619	11,415	36	996	14,956	52	-	-	-
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Section 5

Utility Consumption Incentive										
10	Actual > Rolling Base	-	-	-	-	-	-	-	-	-
11	Actual < Rolling Base	-	-	-	-	-	-	-	-	-
12	75%/25% split	-	-	-	-	-	-	-	-	-
13	75%/25% split	-	-	-	-	-	-	-	-	-

Section 6

Payable Consumption										
14	Annualization of Consumption-New Units	798	11,628	68	-	-	-	373	106,228	-
15	Payable Consumption	1,417	23,043	104	996	14,956	52	373	106,228	-

Section 7

Actual Utility Cost and Average Rate										
16	Actual Utility Costs	\$ 3,211	\$ 1,242	\$ 64	\$ 5,297	\$ 2,909	\$ 137	\$ -	\$ -	\$ -
17	Actual Average Utility Rate	\$ 5.1874	\$ 0.1088	\$ 1.7778	\$ 5.3183	\$ 0.1945	\$ 2.6346	\$ 5.3756	\$ 0.0874	\$ -

Section 8

Base Utilities										
18	Base Utilities Expense Level	\$ 7,351	\$ 2,507	\$ 185	\$ 5,297	\$ 2,909	\$ 137	\$ 2,005	\$ 9,284	\$ -
19	Charge for Excess Utilities			\$ -			\$ -			\$ -
20	Base Utilities Exp Level less Charges			\$ 10,043			\$ 8,343			\$ 11,289
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944

Section 9

Calculation of Utilities Expense Level										
22	UEL adjusted for inflation/deflation		\$ 10,991		\$ 9,131				\$ 12,355	
23	Energy Rate Incentive		\$ -		\$ -				\$ -	
24	Utilities Expense Level		\$ 10,991		\$ 9,131				\$ 12,355	
25	Eligible Unit Months		240		264				480	
26	Utilities Expense Level - PUM		\$ 45.80		\$ 34.59				\$ 25.74	

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #45 Seigle Point			AMP #46 Springcroft at Ashley Park			AMP #48 McAlpine Terrace		
Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level									
01	Actual Consumption	-	-	-	-	-	-	-	-

Section 3

Rolling Base Consumption Level									
02	Rolling Base Year 1	-	-	-	-	-	-	-	-
03	Rolling Base Year 2	-	-	-	-	-	-	-	-
04	Rolling Base Year 3	-	-	-	-	-	-	-	-
05	Total Consumption-Rolling Base	-	-	-	-	-	-	-	-
06	Average Rolling Base Consumption	-	-	-	-	-	-	-	-
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	-	-	-	-	-	-	-	-

Section 4

09	Base Consumption	-	-	-	-	-	-	-	-
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Section 5

Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	-	-	-	-	-
11	Actual < Rolling Base	-	-	-	-	-	-	-	-
12	75%/25% split	-	-	-	-	-	-	-	-
13	75%/25% split	-	-	-	-	-	-	-	-

Section 6

Payable Consumption									
14	Annualization of Consumption-New Units	10,356	40,716	47	168	47,803	-	242	69,048
15	Payable Consumption	10,356	40,716	47	168	47,803	-	242	69,048

Section 7

Actual Utility Cost and Average Rate									
16	Actual Utility Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17	Actual Average Utility Rate	\$ 4.8673	\$ 0.1940	\$ 3.6429	\$ 5.3756	\$ 0.0874	\$ -	\$ 5.3756	\$ 0.0874

Section 8

Base Utilities									
18	Base Utilities Expense Level	\$ 50,406	\$ 7,899	\$ 171	\$ 903	\$ 4,178	\$ -	\$ 1,301	\$ 6,035
19	Charge for Excess Utilities			\$ -			\$ -		\$ -
20	Base Utilities Exp Level less Charges			\$ 58,476			\$ 5,081		\$ 7,336
21	Utilities inflation / deflation factor			1.0944			1.0944		1.0944

Section 9

Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation		\$ 63,996			\$ 5,561			\$ 8,029
23	Energy Rate Incentive		\$ -			\$ -			\$ -
24	Utilities Expense Level		\$ 63,996			\$ 5,561			\$ 8,029
25	Eligible Unit Months		1,224			193			312
26	Utilities Expense Level - PUM		\$ 52.28			\$ 28.81			\$ 25.73

**APPENDIX G Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level**

AMP #49 Glen Cove Apartments		
Sewer / Water	Electricity	Gas

Section 2

Current Consumption Level			
01 Actual Consumption	-	-	-

Section 3

Rolling Base Consumption Level			
02 Rolling Base Year 1	-	-	-
03 Rolling Base Year 2	-	-	-
04 Rolling Base Year 3	-	-	-
05 Total Consumption-Rolling Base	-	-	-
06 Average Rolling Base Consumption	-	-	-
07 Actual Consumption - New Units	-	-	-
08 Rolling Base Consumption	-	-	-

Section 4

09 Base Consumption	-	-	-
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Section 5

Utility Consumption Incentive			
10 Actual > Rolling Base	-	-	-
11 Actual < Rolling Base	-	-	-
12 75%/25% split	-	-	-
13 75%/25% split	-	-	-

Section 6

Payable Consumption			
14 Annualization of Consumption-New Units	785	3,085	-
15 Payable Consumption	785	3,085	-

Section 7

Actual Utility Cost and Average Rate			
16 Actual Utility Costs	\$ -	\$ -	\$ -
17 Actual Average Utility Rate	\$ 4.8673	\$ 0.1940	\$ 3.6429

Section 8

Base Utilities			
18 Base Utilities Expense Level	\$ 3,821	\$ 598	\$ -
19 Charge for Excess Utilities			\$ -
20 Base Utilities Exp Level less Charges			\$ 4,419
21 Utilities inflation / deflation factor			1.0944

Section 9

Calculation of Utilities Expense Level			
22 UEL adjusted for inflation/deflation			\$ 4,836
23 Energy Rate Incentive			\$ -
24 Utilities Expense Level			\$ 4,836
25 Eligible Unit Months			120
26 Utilities Expense Level - PUM			\$ 40.30

APPENDIX H

**Charlotte Housing Authority
Demolition/Disposition Activity**

Demolition/Disposition Activity Description
1a. Development name: Edwin Towers
1b. Development (project) number: 3-06
2. Activity type: <input type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application Status Approved Submitted, pending <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission: 2009 – 2014
5. Number of units affected: None
6. Coverage of action <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for Activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Strawn Apartments
1b. Development (project) number: 3-07
2. Activity type: <input type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application status Approved Submitted, pending approval * <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission 2009-2014

Demolition/Disposition Activity Description
1a. Development name: Central Office (Held by COCC)
1b. Development (project) number: 3-07
2. Activity type: <input type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/> Transfer to COCC
3. Application status Approved Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: None

APPENDIX H

6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Arbor Glen 50 Units and FIC Building
1b. Development (project) number: 3-09
2. Activity type: Demolition X Disposition
3. Application status X Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 10/1/06 Approved
5. Number of units affected: 50 Units and FIC Building
6. Coverage of action X Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 11-15-03 b. Projected end date of activity: 12-31-09

Demolition/Disposition Activity Description
1a. Development name: Boulevard Homes
1b. Development (project) number: 3-11
2. Activity type: X Demolition X Disposition
3. Application status X Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 2008-2009
5. Number of units affected: 300
6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2012 b. Projected end date of activity: 2012

Demolition/Disposition Activity Description
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APPENDIX H

1a. Development name: Dillehay Courts
1b. Development (project) number: 3-12
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 136
6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Cedar Knoll
1b. Development (project) number: 3-16N
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 49
6. Coverage of action X Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Charlottetown Terrace
1b. Development (project) number: 3-18
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014

APPENDIX H

5. Number of units affected: 180
6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Parktowne Terrace
1b. Development (project) number: 3-19
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 164
6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Tall Oaks
1b. Development (project) number: 3-20
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 79
6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
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APPENDIX H

1a. Development name: Savanna Woods
1b. Development (project) number: 3-21M
2. Activity type: <input checked="" type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application status Approved Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 49
6. Coverage of action Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 – 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
Demolition/Disposition Activity Description
1a. Development name: Hall House
1b. Development (project) number: 3-22
2. Activity type: <input checked="" type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application status Approved Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission: 2006 - 2013
5. Number of units affected: 191
6. Coverage of action Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2006 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: Tarlton Hills
1b. Development (project) number: 3-23
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition
3. Application status Approved Submitted, pending approval <input checked="" type="checkbox"/> Planned application

APPENDIX H

4. Date application approved, submitted, or planned for submission: 2009 - 2014

Demolition/Disposition Activity Description
1a. Development name: Gladedale
1b. Development (project) number: 3-25
2. Activity type: <input checked="" type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application status Approved Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 49
6. Coverage of action Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009 - 2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description
1a. Development name: Central Maintenance (Held by COCC)
1b. Development (project) number: 3-31
2. Activity type: <input type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition Transfer to COCC
3. Application status Approved Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission: 2009-2014
5. Number of units affected: 0
6. Coverage of action Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2009-2014 b. Projected end date of activity: 2014

APPENDIX H

Demolition/Disposition Activity Description	
1a. Development name:	Claremont
1b. Development (project) number:	3-93
2. Activity type:	Demolition X Disposition
3. Application status	Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission:	2009-2014
5. Number of units affected:	50
6. Coverage of action	Part of the development X Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 2009-2014 b. Projected end date of activity: 2014

Demolition/Disposition Activity Description	
1a. Development name:	Victoria Square
1b. Development (project) number:	3-95
2. Activity type:	Demolition X Disposition
3. Application status	Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission:	2009-2014
5. Number of units affected:	32
6. Coverage of action	Part of the development X Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 2009-2014 b. Projected end date of activity: 2014

**Charlotte Housing Authority
Rent Simplification Impact Analysis
Completed by Edgemere Consulting**

Methodology & Assumptions

- ◆ CHA provided a narrative summary that outlined the parameters for rent simplification (summary included in the proposed MTW Annual Plan for 2010-2011).
- ◆ CHA provided a dataset containing 2,140 public housing households.
- ◆ CHA provided a dataset containing 3,786 housing choice voucher participants.
- ◆ Households were designated as elderly/disabled if they had a \$400 deduction applied.
- ◆ The following parameters were used in the analysis:

- Annual income included all sources of income per 24 CFR 5.609 with the following exceptions:

- Income from assets valued at \$5,000 or below was excluded
- The Earned Income Disregard was eliminated

- Medical and Childcare Expenses included in the dataset were used to determine the appropriate Medical and/or Childcare Deductions according to the chart below. The deductions for medical and childcare were accounted for separately. For example, if a household had \$3,000 in unreimbursed childcare expenses and \$2,400 in unreimbursed medical expenses, the household would be entitled to a \$2,500 deduction for childcare expenses and no deduction for unreimbursed medical expenses since \$2,400 did not meet the minimum threshold for a deduction:

Expense Amount	Deduction
\$1-\$2500	\$0
\$2501-\$5000	\$2,500
\$5001-\$7500	\$5,000

- Adjusted income is equal to annual income minus unreimbursed medical (for elderly/disabled households) and unreimbursed childcare deductions per the deduction table. The elderly/disabled and dependent deductions were not allowed under rent simplification.
- Analyses were completed examining the impact of both a minimum rent of \$50 and \$75. Existing HCV payment standards, as listed in the dataset, were maintained under the rent simplification model.
- As under the HCV current system, when the gross rent was greater than the payment standard, the difference (or family share) was added to the TTP. Where the TTP is listed in this report (for both the current & proposed models), any family share is included.

Appendix I

- Under the proposed Rent Simplification plan, participants with earned income, whose adjusted income is between \$12,500 and \$35,000 (50% of AMI), will have an incentive payment between \$10 and \$50 held in an escrow account.
- The public housing rents were capped by bedroom size according to ceiling rent. For the analysis, ceiling rent was calculated using 100%, 90% and 80% of the 2010 FMR. These ceiling rents will be referred to as Ceiling Rent A, B, and C, respectively. The table below illustrates the ceiling rents used at each percentage of the FMR.

	FY 2010 FMR		
BR Size	Ceiling Rent A 100%	Ceiling Rent B 90%	Ceiling Rent C 80%
0	\$670	\$603	\$536
1	\$726	\$653	\$581
2	\$806	\$725	\$645
3	\$1,016	\$914	\$813
4	\$1,182	\$1,064	\$946
5	\$1,359	\$1,223	\$1,087

- ◆ There were households with income exclusions related to the Earned Income Disregard (EID). Each of these households had either 100% or 50% of their employment wages excluded. As the EID is not an allowable income deduction under rent simplification, these exclusions were added back to annual income.
- ◆ The dataset provided total asset value and asset income. For each household with asset income, Edgemere determined the percentage of asset income per dollar of asset value. Asset income was then re-calculated using this percentage of the total asset value less the \$5,000 asset exclusion. For example, if a household had \$15,000 in total assets and \$1,500 in asset income, it was determined that the household’s asset income is equal to 10% of the asset value. Since the first \$5,000 in asset value is disregarded, the household’s asset value is \$10,000 (\$15,000 (actual value) - \$5,000 (rent simp asset exclusion)). Asset income is then calculated using asset income of \$10,000 x 10% = \$1,000. If the asset value was less than \$5,000, then no asset income was included.
- ◆ Earned income was calculated as the sum of the following income sources: wages, military, and business pay.
- ◆ The analysis was completed using the following models. The corresponding rent tables for each model are attached to this report.

	Band Size	Rent Percentage
Model 1	\$2,500	30% of Mid-Point
Model 2	\$2,500	28% of Mid-Point
Model 3	\$2,500	27% of Mid-Point
Model 4	\$2,500	30% of Low-End

Appendix I

Model 5	\$2,500	29% of Low-End
Model 6	\$2,000	30% of Mid-Point
Model 7	\$2,000	30% of Low-End
Model 8	\$3,000	30% of Mid-Point
Model 9	\$3,000	30% of Low-End

- ◆ Finally, Edgemere Consulting examined the impact of imposing a \$100 cap on rent increases in the first year.

Results

- ◆ Each of the results reports provides statistical outcomes for the following household types:
 - All households
 - Households currently on flat rent
 - Households not currently on flat rent
 - Elderly/disabled households
 - Non-elderly/disabled households
- ◆ Each public housing report includes the impact of rent simplification on the following:
 - Gross income
 - Total deductions
 - Adjusted income
 - Tenant rent *
 - Percent of tenant rent to gross income *
 - Total rent roll *

* Also included for each of these components is the impact of \$50 and \$75 minimum rent and the \$100 rent increase cap
- ◆ Each housing choice voucher report includes the impact of rent simplification on the following:
 - Gross income
 - Total deductions
 - Adjusted income
 - Tenant Rent *
 - Total Tenant Payment (TTP) *
 - Percent of TTP to gross income *
 - Total HAP *

* Also included for each of these components is the impact of \$50 and \$75 minimum rent and the \$100 rent increase cap

**MODEL 4
RENT SIMPLIFICATION IMPACT ANALYSIS - HCV**

Rent calculated as 30% of low-end of \$2500 Income band
\$75 Minimum Rent

Medical Deduction, Childcare Expense Allowance according to tables

	All Households		Non-Elderly/Disabled Households		Elderly/Disabled Households		Non Excluded Income Households		Excluded Income Households		Households with less than \$7,500 in medical and childcare deductions		Households with more than \$7,500 in medical or childcare deductions	
	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed
Number of Households	3786	3786	2514	2514	1272	1272	3603	3603	183	183	3766	3766	20	20
Gross Income														
Average	\$10,828	\$10,823	\$10,641	\$10,642	\$11,197	\$11,180	\$10,876	\$10,854	\$9,867	\$10,204	\$10,740	\$10,736	\$27,275	\$27,169
Q1	\$5,565	\$5,565	\$2,610	\$2,610	\$8,328	\$8,328	\$5,811	\$5,811	\$2,926	\$2,926	\$5,519	\$5,519	\$17,142	\$17,142
Median	\$8,998	\$8,918	\$8,692	\$8,692	\$9,258	\$9,212	\$9,012	\$8,919	\$8,736	\$8,832	\$8,942	\$8,880	\$25,524	\$25,524
Q3	\$15,440	\$15,444	\$16,794	\$16,794	\$12,798	\$12,792	\$15,448	\$15,420	\$14,926	\$15,947	\$15,313	\$15,347	\$33,241	\$33,241
Max	\$61,594	\$61,594	\$61,594	\$61,594	\$45,136	\$45,136	\$61,594	\$61,594	\$35,909	\$35,809	\$47,004	\$47,003	\$61,594	\$61,594
Total Deductions														
Average	\$1,099	\$97	\$1,249	\$126	\$803	\$39	\$1,098	\$101	\$1,131	\$27	\$1,043	\$71	\$11,647	\$5,000
Q1	\$400	\$0	\$480	\$0	\$400	\$0	\$400	\$0	\$480	\$0	\$400	\$0	\$9,240	\$5,000
Median	\$960	\$0	\$960	\$0	\$400	\$0	\$960	\$0	\$960	\$0	\$960	\$0	\$10,370	\$5,000
Q3	\$1,440	\$0	\$1,440	\$0	\$880	\$0	\$1,440	\$0	\$1,440	\$0	\$1,440	\$0	\$12,270	\$5,000
Max	\$22,240	\$5,000	\$22,240	\$5,000	\$8,659	\$5,000	\$22,240	\$5,000	\$4,800	\$2,500	\$8,380	\$5,000	\$22,240	\$5,000
Adjusted Income														
Average	\$9,839	\$10,726	\$9,556	\$10,516	\$10,400	\$11,140	\$9,887	\$10,754	\$8,908	\$10,177	\$9,808	\$10,665	\$15,693	\$22,169
Q1	\$4,560	\$5,552	\$1,449	\$2,610	\$7,688	\$8,328	\$4,800	\$5,773	\$2,033	\$2,926	\$4,520	\$5,467	\$8,363	\$12,142
Median	\$8,212	\$8,890	\$7,778	\$8,632	\$8,660	\$9,160	\$8,232	\$8,892	\$7,928	\$8,832	\$8,192	\$8,859	\$13,800	\$20,524
Q3	\$14,144	\$15,364	\$15,554	\$16,638	\$11,976	\$12,781	\$14,147	\$15,345	\$13,726	\$15,947	\$14,120	\$15,251	\$23,061	\$28,241
Max	\$45,114	\$56,594	\$45,114	\$56,594	\$40,896	\$45,136	\$45,114	\$56,594	\$35,029	\$35,809	\$45,084	\$47,003	\$45,114	\$56,594
\$75 minimum rent														
Tenant Rent														
Average	\$169	\$167	\$167	\$168	\$173	\$165	\$170	\$168	\$147	\$153	\$168	\$166	\$301	\$400
Q1	\$0	\$6	\$0	\$0	\$91	\$85	\$4	\$10	\$0	\$0	\$0	\$6	\$114	\$188
Median	\$121	\$113	\$87	\$92	\$140	\$122	\$122	\$114	\$82	\$79	\$121	\$112	\$246	\$361
Q3	\$261	\$257	\$288	\$288	\$224	\$218	\$263	\$257	\$224	\$241	\$260	\$256	\$427	\$541
Max	\$1,088	\$1,153	\$1,088	\$1,153	\$945	\$1,048	\$1,088	\$1,153	\$849	\$856	\$1,088	\$1,153	\$864	\$884
Total Tenant Payment*														
Average	\$305	\$308	\$304	\$312	\$307	\$300	\$306	\$308	\$289	\$300	\$304	\$306	\$469	\$568
Q1	\$168	\$188	\$94	\$115	\$198	\$188	\$169	\$188	\$138	\$149	\$167	\$188	\$272	\$364
Median	\$257	\$250	\$254	\$250	\$262	\$250	\$258	\$250	\$240	\$243	\$256	\$250	\$387	\$493
Q3	\$419	\$423	\$461	\$453	\$369	\$374	\$420	\$423	\$401	\$424	\$417	\$420	\$601	\$717
Max	\$1,330	\$1,395	\$1,330	\$1,395	\$1,189	\$1,292	\$1,330	\$1,395	\$1,031	\$1,038	\$1,330	\$1,395	\$1,065	\$1,095
% of TTP to Gross Income**														
Average	33%	34%	33%	35%	33%	32%	33%	34%	33%	34%	33%	34%	20%	25%
Q1	28%	27%	27%	27%	28%	27%	28%	27%	27%	27%	28%	27%	17%	22%
Median	29%	29%	30%	30%	29%	29%	29%	29%	30%	30%	29%	30%	21%	24%
Q3	35%	35%	36%	37%	35%	34%	35%	35%	36%	36%	35%	36%	22%	27%
Max	162%	183%	162%	183%	94%	96%	162%	183%	137%	160%	162%	183%	38%	41%
HAP to OWNER	\$2,081,563	\$2,088,318	\$1,488,370	\$1,485,626	\$593,193	\$602,692	\$1,971,416	\$1,979,290	\$110,147	\$109,028	\$2,071,118	\$2,079,856	\$10,445	\$8,462
UAP	\$71,587	\$54,307	\$69,324	\$52,667	\$2,263	\$1,640	\$66,598	\$50,328	\$4,989	\$3,979	\$71,587	\$54,307	\$0	\$0
Total HAP	\$2,153,150	\$2,142,625	\$1,557,694	\$1,538,293	\$595,456	\$604,332	\$2,038,014	\$2,029,618	\$115,136	\$113,007	\$2,142,705	\$2,134,163	\$10,445	\$8,462
Change in Total HAP		-\$10,525		-\$19,401		\$8,876		-\$113,087		\$102,562		-\$8,542		-\$1,983
Percent Change		0%		-1%		1%		-6%		89%		0%		-19%
Total Incentive		\$23,500		\$21,740		\$1,760		\$22,130		\$1,370		\$23,080		\$420
Total HAP including Incentives		\$2,166,125		\$1,560,033		\$606,092		\$2,051,748		\$114,377		\$2,157,243		\$8,882
Change in Total HAP including Incentives		\$12,975		\$2,339		\$10,636		-\$90,957		\$103,932		\$14,538		-\$1,563
Percent Change		1%		0%		2%		-4%		90%		1%		-15%

* For households with a gross rent greater than their payment standard, the difference (or family share) is added to the TTP. Where the TTP is listed in this report, any family share is included.

** Households with adjusted income of less than \$2,000 were excluded from statistics involving % of TTP to Gross Income

MODEL 4
RENT SIMPLIFICATION IMPACT ANALYSIS - HCV
 Rent calculated as 30% of low-end of \$2500 income band
 \$75 Minimum Rent
 Medical Deduction, Childcare Expense Allowance according to tables

	All Households		Non-Elderly/Disabled Households		Elderly/Disabled Households		Non Excluded Income Households		Excluded Income Households		Households with less than \$7,500 in medical and childcare deductions		Households with more than \$7,500 in medical or childcare deductions	
	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed	Current	Proposed
Number of Households	3786	3786	2514	2514	1272	1272	3603	3603	183	183	3766	3766	20	20
\$75 minimum rent with \$100 cap														
Tenant Rent														
Average	\$169	\$166	\$167	\$167	\$173	\$165	\$170	\$167	\$147	\$147	\$168	\$165	\$301	\$380
Q1	\$0	\$6	\$0	\$0	\$91	\$85	\$4	\$9	\$0	\$0	\$0	\$6	\$114	\$188
Median	\$121	\$113	\$87	\$92	\$140	\$122	\$122	\$114	\$82	\$79	\$121	\$112	\$246	\$339
Q3	\$261	\$256	\$288	\$287	\$224	\$215	\$263	\$257	\$224	\$220	\$260	\$256	\$427	\$521
Max	\$1,088	\$1,153	\$1,088	\$1,153	\$945	\$1,045	\$1,088	\$1,153	\$849	\$856	\$1,088	\$1,153	\$864	\$865
Total Tenant Payment*														
Average	\$305	\$307	\$304	\$312	\$307	\$299	\$306	\$308	\$289	\$294	\$304	\$306	\$469	\$548
Q1	\$168	\$188	\$94	\$115	\$198	\$188	\$169	\$188	\$138	\$149	\$167	\$188	\$272	\$358
Median	\$257	\$250	\$254	\$250	\$262	\$250	\$258	\$250	\$240	\$243	\$256	\$250	\$387	\$480
Q3	\$419	\$420	\$461	\$452	\$369	\$372	\$420	\$421	\$401	\$398	\$417	\$419	\$601	\$675
Max	\$1,330	\$1,395	\$1,330	\$1,395	\$1,189	\$1,289	\$1,330	\$1,395	\$1,031	\$1,038	\$1,330	\$1,395	\$1,065	\$1,076
% of TTP to Gross Income**														
Average	33%	34%	33%	35%	33%	32%	33%	34%	33%	34%	33%	34%	20%	24%
Q1	28%	27%	27%	27%	28%	27%	28%	27%	27%	26%	28%	27%	17%	21%
Median	29%	29%	30%	30%	29%	29%	29%	29%	30%	30%	29%	30%	21%	24%
Q3	35%	35%	36%	37%	35%	34%	35%	35%	36%	36%	35%	36%	22%	26%
Max	162%	183%	162%	183%	94%	96%	162%	183%	137%	160%	162%	183%	38%	41%
HAP to Owner	\$2,081,563	\$2,089,861	\$1,488,370	\$1,486,399	\$593,193	\$603,462	\$1,971,416	\$1,979,735	\$110,147	\$110,126	\$2,071,118	\$2,080,992	\$10,445	\$8,869
UAP	\$71,587	\$54,307	\$69,324	\$52,667	\$2,263	\$1,640	\$66,598	\$50,328	\$4,989	\$3,979	\$71,587	\$54,307	\$0	\$0
Total HAP	\$2,153,150	\$2,144,168	\$1,557,694	\$1,539,066	\$595,456	\$605,102	\$2,038,014	\$2,030,063	\$115,136	\$114,105	\$2,142,705	\$2,135,299	\$10,445	\$8,869
Change in Total HAP		-\$8,982		-\$18,628		\$9,646		-\$112,642		\$103,660		-\$7,406		-\$1,576
Percent Change		0%		-1%		2%		-6%		90%		0%		-15%
Total Incentive		\$23,500		\$21,740		\$1,760		\$22,130		\$1,370		\$23,080		\$420
Total HAP including Incentives		\$2,167,668		\$1,560,806		\$606,862		\$2,052,193		\$115,475		\$2,158,379		\$9,289
Change in Total HAP including Incentives		\$14,518		\$3,112		\$11,406		-\$90,512		\$105,030		\$15,674		-\$1,156
Percent Change		1%		0%		2%		-4%		91%		1%		-11%

* For households with a gross rent greater than their payment standard, the difference (or family share) is added to the TTP. Where the TTP is listed in this report, any family share is included.
 ** Households with adjusted income of less than \$2,000 were excluded from statistics involving % of TTP to Gross Income

MODEL 4
RENT SIMPLIFICATION IMPACT ANALYSIS - HCV
Rent calculated as 30% of low-end of \$2500 income band
\$75 Minimum Rent
Medical Deduction, Childcare Expense Allowance according to tables

CHANGE IN TENANT RENT	All Households		Non-Elderly/Disabled Households		Elderly/Disabled Households		Excluded Income Households		Households with more than \$7,500 in medical or childcare deductions	
	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL
# of Households, Total	3,786	100.00%	2,514	100.00%	1,272	100.00%	183	100.00%	20	100.00%
# of Households whose Tenant Rent decreased	1,708	45.11%	823	32.74%	885	69.58%	69	37.70%	0	0.00%
Difference of \$0 to -\$5	356	20.84%	144	17.50%	212	23.95%	13	18.84%	0	N/A
Difference of -\$6 to -\$25	830	48.59%	403	48.97%	427	48.25%	32	46.38%	0	N/A
Difference -\$26 to -\$50	472	27.63%	249	30.26%	223	25.20%	24	34.78%	0	N/A
Difference -\$51 to -\$75	46	2.69%	27	3.28%	19	2.15%	0	0.00%	0	N/A
Difference -\$76 to -\$100	4	0.23%	0	0.00%	4	0.45%	0	0.00%	0	N/A
Difference -\$101 to -\$125	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	N/A
Difference -\$126 to -\$150	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	N/A
Difference -\$151 to -\$175	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	N/A
Difference -\$176 to -\$200	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	N/A
Difference < -\$200	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	N/A
# of Households whose Rent did not change	898	23.72%	849	33.77%	49	3.85%	54	29.51%	1	5.00%
# of Households whose Tenant Rent increased	1,180	31.17%	842	33.49%	338	26.57%	60	32.79%	19	95.00%
Difference of \$0 to \$5	217	18.39%	133	15.80%	84	24.85%	10	16.67%	0	0.00%
Difference of \$6 to \$25	677	57.37%	494	58.67%	183	54.14%	35	58.33%	0	0.00%
Difference \$26 to \$50	213	18.05%	155	18.41%	58	17.16%	10	16.67%	2	10.53%
Difference \$51 to \$75	44	3.73%	36	4.28%	8	2.37%	1	1.67%	3	15.79%
Difference \$76 to \$100	14	1.19%	13	1.54%	1	0.30%	0	0.00%	6	31.58%
Difference \$101 to \$125	7	0.59%	6	0.71%	1	0.30%	0	0.00%	4	21.05%
Difference \$126 to \$150	2	0.17%	2	0.24%	0	0.00%	0	0.00%	2	10.53%
Difference \$151 to \$175	1	0.08%	1	0.12%	0	0.00%	0	0.00%	1	5.26%
Difference \$176 to \$200	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Difference > \$200	5	0.42%	2	0.24%	3	0.89%	4	6.67%	1	5.26%

MODEL 4

RENT SIMPLIFICATION ANALYSIS – PUBLIC HOUSING

Rent Calculated as 27% of Low-end of \$2500 Income Band, \$75 Minimum Rent, Ceiling Rent Equal to Percentage of FMR
 Medical Deduction, Childcare Expense Allowance According to Tables

	All Households				Non Flat Rent Households				Flat Rent Households				Non-Elderly Households				Elderly Households			
	Current	Proposed (Ceiling Rent = 100% FMR)	Proposed (Ceiling Rent = 90% FMR)	Proposed (Ceiling Rent = 80% FMR)	Current	Proposed (Ceiling Rent = 100% FMR)	Proposed (Ceiling Rent = 90% FMR)	Proposed (Ceiling Rent = 80% FMR)	Current	Proposed (Ceiling Rent = 100% FMR)	Proposed (Ceiling Rent = 90% FMR)	Proposed (Ceiling Rent = 80% FMR)	Current	Proposed (Ceiling Rent = 100% FMR)	Proposed (Ceiling Rent = 90% FMR)	Proposed (Ceiling Rent = 80% FMR)	Current	Proposed (Ceiling Rent = 100% FMR)	Proposed (Ceiling Rent = 90% FMR)	Proposed (Ceiling Rent = 80% FMR)
Number of Households	2140	2140	2140	2140	2057	2057	2057	2057	83	83	83	83	1135	1135	1135	1135	1005	1005	1005	1005
Gross Income																				
Average	\$8,309	\$8,331	\$8,331	\$8,331	\$7,601	\$7,624	\$7,624	\$7,624	\$25,869	\$25,869	\$25,869	\$25,869	\$6,575	\$6,616	\$6,616	\$6,616	\$10,268	\$10,268	\$10,268	\$10,268
Q1	\$3,104	\$3,245	\$3,245	\$3,245	\$2,832	\$2,832	\$2,832	\$2,832	\$20,009	\$20,009	\$20,009	\$20,009	\$0	\$0	\$0	\$0	\$8,088	\$8,088	\$8,088	\$8,088
Median	\$8,088	\$8,088	\$8,088	\$8,088	\$8,088	\$8,088	\$8,088	\$8,088	\$23,556	\$23,556	\$23,556	\$23,556	\$3,888	\$3,900	\$3,900	\$3,900	\$8,432	\$8,388	\$8,388	\$8,388
Q3	\$10,813	\$10,872	\$10,872	\$10,872	\$10,260	\$10,260	\$10,260	\$10,260	\$29,631	\$29,631	\$29,631	\$29,631	\$9,750	\$9,899	\$9,899	\$9,899	\$11,189	\$11,189	\$11,189	\$11,189
Max	\$60,006	\$60,006	\$60,006	\$60,006	\$31,938	\$31,938	\$31,938	\$31,938	\$60,006	\$60,006	\$60,006	\$60,006	\$60,006	\$60,006	\$60,006	\$60,006	\$45,316	\$45,316	\$45,316	\$45,316
Total Deductions																				
Average	\$819	\$74	\$74	\$74	\$824	\$69	\$69	\$69	\$707	\$181	\$181	\$181	\$895	\$40	\$40	\$40	\$734	\$112	\$112	\$112
Q1	\$400	\$0	\$0	\$0	\$400	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$400	\$0	\$0	\$0
Median	\$480	\$0	\$0	\$0	\$480	\$0	\$0	\$0	\$400	\$0	\$0	\$0	\$480	\$0	\$0	\$0	\$400	\$0	\$0	\$0
Q3	\$960	\$0	\$0	\$0	\$960	\$0	\$0	\$0	\$960	\$0	\$0	\$0	\$1,440	\$0	\$0	\$0	\$880	\$0	\$0	\$0
Max	\$13,210	\$7,500	\$7,500	\$7,500	\$13,210	\$7,500	\$7,500	\$7,500	\$6,495	\$5,000	\$5,000	\$5,000	\$11,880	\$7,500	\$7,500	\$7,500	\$13,210	\$7,500	\$7,500	\$7,500
Adjusted Income																				
Average	\$7,625	\$8,258	\$8,258	\$8,258	\$6,918	\$7,554	\$7,554	\$7,554	\$25,162	\$25,688	\$25,688	\$25,688	\$5,928	\$6,577	\$6,577	\$6,577	\$9,542	\$10,156	\$10,156	\$10,156
Q1	\$2,206	\$3,203	\$3,203	\$3,203	\$2,053	\$2,832	\$2,832	\$2,832	\$19,199	\$19,843	\$19,843	\$19,843	\$0	\$0	\$0	\$0	\$7,688	\$8,088	\$8,088	\$8,088
Median	\$7,688	\$8,088	\$8,088	\$8,088	\$7,688	\$8,088	\$8,088	\$8,088	\$22,520	\$23,017	\$23,017	\$23,017	\$2,640	\$3,900	\$3,900	\$3,900	\$7,940	\$8,376	\$8,376	\$8,376
Q3	\$9,911	\$10,801	\$10,801	\$10,801	\$9,380	\$10,260	\$10,260	\$10,260	\$29,191	\$29,631	\$29,631	\$29,631	\$8,948	\$9,873	\$9,873	\$9,873	\$10,472	\$11,100	\$11,100	\$11,100
Max	\$59,046	\$60,006	\$60,006	\$60,006	\$29,924	\$30,324	\$30,324	\$30,324	\$59,046	\$60,006	\$60,006	\$60,006	\$59,046	\$60,006	\$60,006	\$60,006	\$44,916	\$45,316	\$45,316	\$45,316
Tenant Rent - \$75 min rent																				
Average	\$195	\$200	\$200	\$199	\$184	\$185	\$185	\$185	\$477	\$581	\$567	\$546	\$161	\$175	\$175	\$174	\$234	\$229	\$228	\$227
Q1	\$56	\$75	\$75	\$75	\$52	\$75	\$75	\$75	\$375	\$438	\$438	\$438	\$50	\$75	\$75	\$75	\$192	\$188	\$188	\$188
Median	\$192	\$188	\$188	\$188	\$192	\$188	\$188	\$188	\$450	\$563	\$563	\$536	\$66	\$75	\$75	\$75	\$199	\$188	\$188	\$188
Q3	\$248	\$250	\$250	\$250	\$235	\$250	\$250	\$250	\$566	\$688	\$688	\$645	\$224	\$188	\$188	\$188	\$262	\$250	\$250	\$250
Max	\$748	\$1,016	\$914	\$875	\$748	\$688	\$688	\$688	\$683	\$1,016	\$914	\$875	\$723	\$1,016	\$914	\$813	\$748	\$875	\$875	\$875
% of Tenant Rent to Gross Income*																				
Average	27%	27%	27%	27%	27%	27%	27%	27%	24%	27%	27%	26%	26%	27%	27%	27%	28%	27%	27%	27%
Q1	26%	25%	25%	25%	27%	25%	25%	25%	20%	27%	26%	26%	25%	26%	26%	26%	28%	25%	25%	25%
Median	28%	27%	27%	27%	28%	27%	27%	27%	24%	28%	28%	27%	27%	27%	27%	27%	28%	27%	27%	27%
Q3	29%	28%	28%	28%	29%	28%	28%	28%	27%	29%	29%	29%	30%	28%	28%	28%	29%	28%	28%	28%
Max	40%	30%	30%	30%	30%	30%	30%	30%	40%	30%	30%	30%	35%	30%	30%	30%	40%	30%	30%	30%
Total Rent Roll	\$417,492	\$428,761	\$427,494	\$425,564	\$377,875	\$380,545	\$380,443	\$380,260	\$39,617	\$48,216	\$47,051	\$45,304	\$182,326	\$198,755	\$198,129	\$197,072	\$235,166	\$230,006	\$229,365	\$228,492
Change in Total Rent Roll		\$11,269	\$10,002	\$8,072		\$2,670	\$2,568	\$2,385		\$8,599	\$7,434	\$5,687		\$16,429	\$15,803	\$14,746		-\$5,160	-\$5,801	-\$6,674
Total Incentive		\$4,805	\$4,805	\$4,805		\$3,140	\$3,140	\$3,140		\$1,665	\$1,665	\$1,665		\$3,765	\$3,765	\$3,765		\$1,040	\$1,040	\$1,040
Net Rent Roll		\$423,956	\$422,689	\$420,759		\$377,405	\$377,303	\$377,120		\$46,551	\$45,386	\$43,639		\$194,990	\$194,364	\$193,307		\$228,966	\$228,325	\$227,452
Change in Net Rent Roll		\$6,464	\$5,197	\$3,267		-\$470	-\$572	-\$755		\$6,934	\$5,769	\$4,022		\$12,664	\$12,038	\$10,981		-\$6,200	-\$6,841	-\$7,714
With \$100 cap																				
Tenant Rent - \$75 min rent																				
Average	\$195	\$198	\$198	\$198	\$184	\$185	\$185	\$185	\$477	\$526	\$526	\$523	\$161	\$172	\$172	\$172	\$234	\$227	\$227	\$227
Q1	\$56	\$75	\$75	\$75	\$52	\$75	\$75	\$75	\$375	\$438	\$438	\$438	\$50	\$75	\$75	\$75	\$192	\$188	\$188	\$188
Median	\$192	\$188	\$188	\$188	\$192	\$188	\$188	\$188	\$450	\$500	\$500	\$500	\$66	\$75	\$75	\$75	\$199	\$188	\$188	\$188
Q3	\$248	\$250	\$250	\$250	\$235	\$250	\$250	\$250	\$566	\$604	\$604	\$604	\$224	\$188	\$188	\$188	\$262	\$250	\$250	\$250
Max	\$748	\$762	\$756	\$756	\$748	\$688	\$688	\$688	\$683	\$762	\$756	\$756	\$723	\$762	\$750	\$750	\$748	\$756	\$756	\$756
% of Tenant Rent to Gross Income*																				
Average	27%	27%	27%	27%	27%	27%	27%	27%	24%	26%	26%	25%	26%	27%	27%	27%	28%	27%	27%	27%
Q1	26%	25%	25%	25%	27%	25%	25%	25%	20%	24%	24%	23%	25%	25%	25%	25%	28%	25%	25%	25%
Median	28%	27%	27%	27%	28%	27%	27%	27%	24%	27%	27%	27%	27%	27%	27%	27%	28%	27%	27%	27%
Q3	29%	28%	28%	28%	29%	28%	28%	28%	27%	28%	28%	28%	30%	28%	28%	28%	29%	28%	28%	28%
Max	40%	30%	30%	30%	30%	30%	30%	30%	40%	30%	30%	30%	35%	30%	30%	30%	40%	30%	30%	30%
Total Rent Roll	\$417,492	\$423,739	\$423,600	\$423,213	\$377,875	\$380,059	\$379,957	\$379,774	\$39,617	\$43,680	\$43,643	\$43,439	\$182,326	\$195,718	\$195,681	\$195,502	\$235,166	\$228,021	\$227,919	\$227,711
Change in Total Rent Roll		\$6,247	\$6,108	\$5,721		\$2,184	\$2,082	\$1,899		\$4,063	\$4,026	\$3,822		\$13,392	\$13,355	\$13,176		-\$7,145	-\$7,247	-\$7,455
Total Incentive		\$4,805	\$4,805	\$4,805		\$3,140	\$3,140	\$3,140		\$1,665	\$1,665	\$1,665		\$3,765	\$3,765	\$3,765		\$1,040	\$1,040	\$1,040
Net Rent Roll		\$418,934	\$418,795	\$418,408		\$376,919	\$376,817	\$376,634		\$42,015	\$41,978	\$41,774		\$191,953	\$191,916	\$191,737		\$226,981	\$226,879	\$226,671
Change in Net Rent Roll		\$1,442	\$1,303	\$916		-\$956	-\$1,058	-\$1,241		\$2,398	\$2,361	\$2,157		\$9,627	\$9,590	\$9,411		-\$8,185	-\$8,287	-\$8,495

* Households on minimum rent were excluded from statistics involving % of Tenant Rent to Gross Income

MODEL 4

RENT SIMPLIFICATION ANALYSIS – PUBLIC HOUSING

Rent Calculated as 27% of Low-end of \$2500 Income Band, \$75 Minimum Rent, Ceiling Rent Equal to Percentage of FMR
 Medical Deduction, Childcare Expense Allowance According to Tables

CHANGE IN TENANT RENT	All Households						Households not on Flat Rent						Households on Flat Rent					
	Using Ceiling Rent of 100% FMR:		Using Ceiling Rent of 90% FMR:		Using Ceiling Rent of 80% FMR:		Using Ceiling Rent of 100% FMR:		Using Ceiling Rent of 90% FMR:		Using Ceiling Rent of 80% FMR:		Using Ceiling Rent of 100% FMR:		Using Ceiling Rent of 90% FMR:		Using Ceiling Rent of 80% FMR:	
	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL
# of Households, Total	2,140	100.00%	2,140	100.00%	2,140	100.00%	2,057	100.00%	2,057	100.00%	2,057	100.00%	83	100.00%	83	100.00%	83	100.00%
# of Households whose Tenant Rent decreased	1,045	48.83%	1,045	48.83%	1,046	48.88%	1,031	50.12%	1,031	50.12%	1,031	50.12%	14	16.87%	14	16.87%	15	18.07%
Difference of \$0 to -\$5	227	21.72%	227	21.72%	227	21.70%	227	22.02%	227	22.02%	227	22.02%	0	0.00%	0	0.00%	0	0.00%
Difference of -\$6 to -\$25	489	46.79%	488	46.70%	488	46.65%	484	46.94%	483	46.85%	482	46.75%	5	35.71%	5	35.71%	6	40.00%
Difference -\$26 to -\$50	290	27.75%	291	27.85%	290	27.72%	286	27.74%	287	27.84%	286	27.74%	4	28.57%	4	28.57%	4	26.67%
Difference -\$51 to -\$75	33	3.16%	33	3.16%	34	3.25%	32	3.10%	32	3.10%	33	3.20%	1	7.14%	1	7.14%	1	6.67%
Difference -\$76 to -\$100	2	0.19%	1	0.10%	1	0.10%	1	0.10%	0	0.00%	0	0.00%	1	7.14%	1	7.14%	1	6.67%
Difference -\$101 to -\$125	1	0.10%	1	0.10%	2	0.19%	0	0.00%	0	0.00%	1	0.10%	1	7.14%	1	7.14%	1	6.67%
Difference -\$126 to -\$150	2	0.19%	3	0.29%	2	0.19%	1	0.10%	2	0.19%	1	0.10%	1	7.14%	1	7.14%	1	6.67%
Difference -\$151 to -\$175	1	0.10%	1	0.10%	1	0.10%	0	0.00%	0	0.00%	0	0.00%	1	7.14%	1	7.14%	1	6.67%
Difference -\$176 to -\$200	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Difference < -\$200	0	0.00%	0	0.00%	1	0.10%	0	0.00%	0	0.00%	1	0.10%	0	0.00%	0	0.00%	0	0.00%
# of Households whose Rent did not change	33	1.54%	33	1.54%	33	1.54%	26	1.26%	26	1.26%	26	1.26%	7	8.43%	7	8.43%	7	8.43%
# of Households whose Tenant Rent increased	1,062	49.63%	1,062	49.63%	1,061	49.58%	1,000	48.61%	1,000	48.61%	1,000	48.61%	62	74.70%	62	74.70%	61	73.49%
Difference of \$0 to \$5	91	8.57%	91	8.57%	91	8.58%	90	9.00%	90	9.00%	90	9.00%	1	1.61%	1	1.61%	1	1.64%
Difference of \$6 to \$25	799	75.24%	799	75.24%	799	75.31%	796	79.60%	796	79.60%	796	79.60%	3	4.84%	3	4.84%	3	4.92%
Difference \$26 to \$50	94	8.85%	94	8.85%	96	9.05%	85	8.50%	85	8.50%	85	8.50%	9	14.52%	9	14.52%	11	18.03%
Difference \$51 to \$75	34	3.20%	35	3.30%	34	3.20%	22	2.20%	22	2.20%	22	2.20%	12	19.35%	13	20.97%	12	19.67%
Difference \$76 to \$100	5	0.47%	5	0.47%	6	0.57%	2	0.20%	2	0.20%	2	0.20%	3	4.84%	3	4.84%	4	6.56%
Difference \$101 to \$125	5	0.47%	7	0.66%	6	0.57%	1	0.10%	1	0.10%	1	0.10%	4	6.45%	6	9.68%	5	8.20%
Difference \$126 to \$150	4	0.38%	3	0.28%	10	0.94%	1	0.10%	1	0.10%	1	0.10%	3	4.84%	2	3.23%	9	14.75%
Difference \$151 to \$175	3	0.28%	4	0.38%	8	0.75%	1	0.10%	1	0.10%	1	0.10%	2	3.23%	3	4.84%	7	11.48%
Difference \$176 to \$200	2	0.19%	2	0.19%	3	0.28%	0	0.00%	0	0.00%	0	0.00%	2	3.23%	2	3.23%	3	4.92%
Difference > \$200	25	2.35%	22	2.07%	8	0.75%	2	0.20%	2	0.20%	2	0.20%	23	37.10%	20	32.26%	6	9.84%

**MODEL 4
RENT SIMPLIFICATION ANALYSIS – PUBLIC HOUSING**

Rent Calculated as 27% of Low-end of \$2500 Income Band, \$75 Minimum Rent, Ceiling Rent Equal to Percentage of FMR
Medical Deduction, Childcare Expense Allowance According to Tables

CHANGE IN TENANT RENT	All Households						Non-Elderly Households						Elderly Households					
	Using Ceiling Rent of 100% FMR:		Using Ceiling Rent of 90% FMR:		Using Ceiling Rent of 80% FMR:		Using Ceiling Rent of 100% FMR:		Using Ceiling Rent of 90% FMR:		Using Ceiling Rent of 80% FMR:		Using Ceiling Rent of 100% FMR:		Using Ceiling Rent of 90% FMR:		Using Ceiling Rent of 80% FMR:	
	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL	# OF TENANTS	% OF TOTAL
# of Households, Total	2,140	100.00%	2,140	100.00%	2,140	100.00%	1,135	100.00%	1,135	100.00%	1,135	100.00%	1,005	100.00%	1,005	100.00%	1,005	100.00%
# of Households whose Tenant Rent decreased	1,045	48.83%	1,045	48.83%	1,046	48.88%	331	29.16%	331	29.16%	332	29.25%	714	71.04%	714	71.04%	714	71.04%
Difference of \$0 to -\$5	227	21.72%	227	21.72%	227	21.70%	59	17.82%	59	17.82%	59	17.77%	168	23.53%	168	23.53%	168	23.53%
Difference -\$6 to -\$25	489	46.79%	488	46.70%	488	46.65%	151	45.62%	151	45.62%	151	45.48%	338	47.34%	337	47.20%	337	47.20%
Difference -\$26 to -\$50	290	27.75%	291	27.85%	290	27.72%	94	28.40%	94	28.40%	94	28.31%	196	27.45%	197	27.59%	196	27.45%
Difference -\$51 to -\$75	33	3.16%	33	3.16%	34	3.25%	25	7.55%	25	7.55%	26	7.83%	8	1.12%	8	1.12%	8	1.12%
Difference -\$76 to -\$100	2	0.19%	1	0.10%	1	0.10%	1	0.30%	1	0.30%	1	0.30%	1	0.14%	0	0.00%	0	0.00%
Difference -\$101 to -\$125	1	0.10%	1	0.10%	2	0.19%	1	0.30%	1	0.30%	1	0.30%	0	0.00%	0	0.00%	1	0.14%
Difference -\$126 to -\$150	2	0.19%	3	0.29%	2	0.19%	0	0.00%	0	0.00%	0	0.00%	2	0.28%	3	0.42%	2	0.28%
Difference -\$151 to -\$175	1	0.10%	1	0.10%	1	0.10%	0	0.00%	0	0.00%	0	0.00%	1	0.14%	1	0.14%	1	0.14%
Difference -\$176 to -\$200	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Difference < -\$200	0	0.00%	0	0.00%	1	0.10%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	0.14%
# of Households whose Rent did not change	33	1.54%	33	1.54%	33	1.54%	10	0.88%	10	0.88%	10	0.88%	23	2.29%	23	2.29%	23	2.29%
# of Households whose Tenant Rent increased	1,062	49.63%	1,062	49.63%	1,061	49.58%	794	69.96%	794	69.96%	793	69.87%	268	26.67%	268	26.67%	268	26.67%
Difference of \$0 to \$5	91	8.57%	91	8.57%	91	8.58%	26	3.27%	26	3.27%	26	3.28%	65	24.25%	65	24.25%	65	24.25%
Difference of \$6 to \$25	799	75.24%	799	75.24%	799	75.31%	665	83.75%	665	83.75%	665	83.86%	134	50.00%	134	50.00%	134	50.00%
Difference \$26 to \$50	94	8.85%	94	8.85%	96	9.05%	55	6.93%	55	6.93%	56	7.06%	39	14.55%	39	14.55%	40	14.93%
Difference \$51 to \$75	34	3.20%	35	3.90%	34	3.20%	23	2.90%	24	3.02%	23	2.90%	11	4.10%	11	4.10%	11	4.10%
Difference \$76 to \$100	5	0.47%	5	0.47%	6	0.57%	2	0.25%	2	0.25%	2	0.25%	3	1.12%	3	1.12%	4	1.49%
Difference \$101 to \$125	5	0.47%	7	0.66%	6	0.57%	3	0.38%	4	0.50%	4	0.50%	2	0.75%	3	1.12%	2	0.75%
Difference \$126 to \$150	4	0.38%	3	0.28%	10	0.94%	3	0.38%	2	0.25%	5	0.63%	1	0.37%	1	0.37%	5	1.87%
Difference \$151 to \$175	3	0.28%	4	0.38%	8	0.75%	2	0.25%	2	0.25%	4	0.50%	1	0.37%	2	0.75%	4	1.49%
Difference \$176 to \$200	2	0.19%	2	0.19%	3	0.28%	1	0.13%	1	0.13%	1	0.13%	1	0.37%	1	0.37%	2	0.75%
Difference > \$200	25	2.35%	22	2.07%	8	0.75%	14	1.76%	13	1.64%	7	0.88%	11	4.10%	9	3.36%	1	0.37%