

HAC STAFF AND RESIDENT COUNCIL ANNUAL/5Y CAPITAL FUND PLAN MEETING

January 24, 2025

10:00-11:30 AM

AGENDA

- **Welcome/Introductions** C Bradburn
- **Opening Remarks**
- **Resident Surveys/Input** J Adkins

- **Housing Program Updates** G Pereda/S Wilson/S Brown
 - **Lease**
 - **Sect 12: Pest Control Refusal** – Fee changes from \$45 to \$100, with notice of lease termination
 - **Sect 15: Over/Under Housed** - Tenants will be notified at move-in that they will be subject to move at their expense if their household size changes.
 - **Admissions and Continued Occupancy (ACOP)**
 - HUD/HOTMA – PH/HCV changes in housing policies
 - Reasonable accommodations – 504 policies and procedures have been added in support of persons with disabilities
 - **Tenant Charges (See revised schedules)**
 - Flat Rents
 - Security Deposits
 - Maintenance Charges: Labor charges are \$45/hour and will be billed at a minimum of one hour.
 - **Property Management**
 - Community Room / Recreation Hall Reservations
 - Pest Control and Extermination
 - Curb Appeal Rules for Clean and Safe Communities
 - Resident Parking Policy (Golden Tower)

- **Capital Fund Projects - Priorities and Budget** L DiGirolamo

- **Other Strategic Initiatives** C Bradburn
 - Sale of City Heights
 - Public Housing/HCV Program Consolidation
 - Emery Drive, ESRII, ESRIII - RAD conversion
 - Physical Needs Assessments/Modernization for select site properties
 - Disposition of 1016 Greenup (commercial property)
 - Moving to Work (MTW) Designation

- **45 Day Comment Period begins 2/14/2025, ends 3/31/2025;** Annual Plan documents will be available on the HAC website; One hard copy will be at 2300 Madison Ave.
- **Public Hearing 4/16/2025**
- **Comments/Questions**
- **Adjournment**



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| Meeting: Annual Plan/5Y Capital Fund Meeting – Senior Staff & Resident Councils | Date: 1/24/2025 |
|--|------------------------|

Sign-In Sheet

| # | Name | Title | Organization |
|----|-------------------|-------------------------------|-----------------|
| 1 | Shabouille Pereda | L.R. Manager | HAC |
| 2 | Shannon Wilson | Senior Housing Mgr | HAC |
| 3 | Mylene Thomas | Housing Sp. 504 Coord. | HAC |
| 4 | Sharon Brown | prop. Mng. LT. | HAC |
| 5 | Lestell Thum | LTC | LATONIA TERRACE |
| 6 | Chris Brubaker | Deputy Director | HAC |
| 7 | Linda DiGirolamo | Procurement/Capital Asset Mgr | HAC |
| 8 | Kelli Cornett | Eq Asst | HAC |
| 9 | Steve Arlinghaus | Eq Dir | HAC |
| 10 | Veronica Nelson | Council | HAC |
| 11 | | | |
| 12 | Jon Adkins | Dir of Res Serv | HAC |
| 13 | April Peacock | Program Manager | HAC |
| 14 | | | |
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HUD Enforcement Prior to July 1, 2025

1. **Earned Income Disregard (EID) – January 1, 2024**
 - PHAs are expected to have ceased enrollment into EID as of December 31, 2023.
2. **Use of Form HUD-9886-A – No later than February 1, 2025**
 - Form HUD-9886-A will be the only approved version of the authorization for release of information form following the expiration of HUD-9886 on January 31, 2025

HUD Enforcement No Later than July 1, 2025

All transactions with an effective date on or after July 1, 2025 must comply with the following provisions. Since the reexamination process typically starts 90-120 days before the effective date, PHAs may need to comply with these provisions as soon as March 3, 2025

1. **Income Exclusions**
 - PHAs must utilize the list of income exclusions noted in 24 CFR 5.609(b) for all income examinations with an effective date on or after July 1, 2025.
2. **Definitions**
 - PHAs must use definitions identified in this notice for all transactions with an effective date on or after July 1, 2025
3. **De Minimis Errors**
 - Refer to [PIH Notice 2023-27](#) for guidance on de minimis errors.

HOTMA Definitions Effective 7/1/25

Earned Income

Regulation: 24 CFR § 5.100

Summary: Earned Income is defined as income or earnings from wages, tips, salaries, other employee compensation, and net income from self-employment. Earned income does not include any pension or annuity, transfer payments (meaning payments made or income received in which no goods or services are being paid for, such as welfare assistance, Social Security, and other governmental subsidies/benefits), or any cash or in-kind benefits.

Definition of Day Laborer

Regulation: 24 CFR § 5.603(b)

Summary: A day laborer is defined as an individual hired and paid one day at a time without an agreement that the individual will be hired or work again in the future. Income earned as a day laborer is not considered nonrecurring income.

Definition of Family

Regulation: 24 CFR § 5.403

Summary: The final rule revises the definition of family to also include a single person who: Is an otherwise eligible youth who has attained at least 18 years of age and not more than 24 years of age; Has left foster care, or will leave foster care within 90 days, in accordance with a transition plan described in section 475(5)(H) of the Social Security Act (42 U.S.C.675(5)(H)); and

Is homeless or is at risk of becoming homeless at age 16 or older.

The definition of “family” in the final rule incorporates revisions made to the 1937 Act by the Fostering Stable Housing Opportunities provisions of the Consolidated Appropriations Act, 2021, which expands the definition of “single persons.” Due to the modification of the statute prior to this final rule, HUD is making a conforming change to

HOTMA Definitions Effective 7/1/25

24 CFR § 5.403 to align with the new statutory language.

New Definitions of Foster Adult and Foster Child

Regulation: 24 CFR § 5.603

Summary: The final rule establishes definitions for “foster adult” and “foster child.” A foster adult is defined as a member of the household who is 18 years or older and meets the definition of a foster adult under state law. State-level agencies define who is considered a foster adult/child, so the classification may vary from state to state. In general, a foster adult is unable to live independently due to a debilitating physical or mental condition and is placed with the family by an authorized placement agency or by judgment, decree, or other order of any court of competent jurisdiction.

A foster child is defined as a member of the household who meets the definition of a foster child under state law. In general, a foster child is placed with the family by an authorized placement agency (e.g., public child welfare agency) or by judgment, decree, or other order of any court of competent jurisdiction.

Foster adults/children are not considered family members and must not be included in calculations of income for eligibility and rent determination purposes. However, foster adults/children are considered household members and must be included when determining unit size or subsidy standards based on established policies.

The definition of “dependent” under § 5.603 was revised to explicitly exclude foster children and foster adults. PHAs/MFH Owners may not provide a dependent deduction under § 5.611(a) for a foster child or foster adult. Consistent with the determination that foster adults/children are not family members, income earned by foster adults/children, payments received for the care of foster adults/children, and expenses incurred related to foster adults/children are not considered to be family income or family expenses used in the determination of annual income. Reasonable unreimbursed child-care expenses (as

HOTMA Definitions Effective 7/1/25

defined in § 5.603) for foster children under 13 years of age may be deducted from annual income if those expenses are necessary to enable a member of the family to work, look for work, or to further their education, but only if the unreimbursed child-care expense for the care of the foster child is paid from the family's annual income (and not another source, such as a stipend from a child welfare agency). PHAs may use their discretion to establish permissive deductions pursuant to 24 CFR 5.611(b) related to foster children and foster adults – for example, to allow unreimbursed health and medical expenses (defined in § 5.603) of an elderly or disabled family related to their foster child or foster adult to be deducted from annual income, so long as the expenses are paid from the elderly or disabled family's annual income (and not another source, such as a stipend from a child welfare agency). MFH Owners are not permitted to adopt permissive deductions (see section C.7 for information on permissive deductions).

Families may be eligible to continue to receive the child-care expense deduction, pursuant to a hardship exemption, when the unreimbursed child-care expense is for the care of a foster child under the age of 13, but only if the unreimbursed child-care expense for the care of the foster child is paid from the family's annual income (and not another source, such as a stipend from a child welfare agency). See Attachment C (paragraph C.5) (Child-Care Expenses Deduction and Hardship Exemption to Continue Child-Care Expenses Deduction) of this notice.

When a member of an assisted family is temporarily placed in foster care (as confirmed by the state child welfare agency), the member is still counted as a family member in the unit from which they were removed. This means that a foster child or foster adult could be considered an assisted family member in one household while also being a foster child or adult in another household and receiving consideration in both families' voucher size and/or unit size.

HOTMA Definitions Effective 7/1/25

Dependent

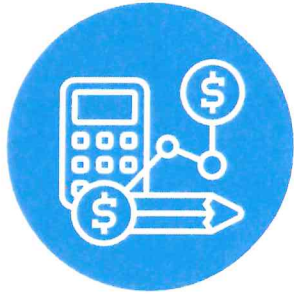
A member of the family (which excludes foster children and foster adults) other than the family head or spouse who is under 18 years of age, or is a person with a disability, or is a full-time student.

Health and medical care expenses

Health and medical care expenses are any costs incurred in the diagnosis, cure, mitigation, treatment, or prevention of disease or payments for treatments affecting any structure or function of the body. Health and medical care expenses include medical insurance premiums and long-term care premiums that are paid or anticipated during the period for which annual income is computed.

Minor

A member of the family, other than the head of family or spouse, who is under 18 years of age.



HOTMA Resident Fact Sheet: Income Calculation and Reviews

*This fact sheet is for families who live in public housing or have Housing Choice Vouchers from Section 8 (HCV). **There are new rules on the way income is counted** because of a federal law, the Housing Opportunity Through Modernization Act of 2016 (HOTMA). Your local public housing agency (PHA) will start using these rules by January 1, 2025. Your PHA will tell you before the changes begin. This fact sheet is **not official** or required by HUD or your PHA.*

Rules from HUD explain what counts towards your yearly income which is used to figure out your rent. New rules change what money should be **included** and **not included** as part of your income. Once the PHA determines your income, they adjust it by taking out the deductions your family qualifies for. **These changes might affect how much rent you pay, but your rent, or subsidy amount (HCV), will still be based on 30% of your monthly adjusted income.** Adjusted income is what's left after the PHA takes out certain income and costs from your yearly family income. In the HCV program, you may pay more than 30% of your monthly adjusted income if the gross rent is higher than the PHA's payment standard.

Income Calculations

Your family's **income** includes money that your family members who are 18 years old or older make from work (earned income). It also includes money that comes in for any family member, including kids under 18, (unearned income) and income from the assets you own.

Examples of earned income (not included for kids under 18 years old):

- Money from a job like wages, salaries, tips, or other payments.
- Money you make from your own business.
- Money you earn as a day labor, doing seasonal work, or as an independent contractor.

Examples of unearned income (from all family members):

- Government benefits like Temporary Assistance for Needy Families (TANF), social security, or disability payments.
- Any money you get regularly from a pension or annuity.
- Child support payments.
- Income from assets, such as stocks, bonds, or other financial investments.



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In general, all income is **included** in your calculation unless the rules say that it should not be. Examples of common sources of income that are **not included**:

- Money you get from a one-time job (temporary employment).
- State or federal tax refunds, credits, or economic stimulus payments.
- Gifts for special occasions like holidays or birthdays.
- Donations like food, clothing, or toiletries from a food bank or similar organization.
- Certain payments that help people with disabilities live at home.
- Financial aid or money for school, including educational savings accounts. You can find more information on the [HOTMA Resident Worksheet: Student Financial Aid](#).
- Money you get for taking care of foster children or foster adults.
- Money earned by children under the age of 18, including foster children.

For a full list of sources of income **not included** as part of your family's income calculation, see the [HOTMA Income and Income Exclusions Resource Sheet](#).

Also, if you pay for childcare and/or medical expenses, you may be eligible for extra deductions. For more information, please see the [HOTMA Resident Fact Sheet: Health, Medical, and Childcare Deductions](#).

Interim Reviews

If your income, or the people who live with you, changes between your yearly reviews, talk to your PHA as soon as you can. If your PHA thinks that your income will change by more than 10% (up **or** down), you **might** have to do an interim review before your next yearly review. (Your PHA might say “reexamination” or “recertification” instead of review).

- **Change in the household: Always report changes on who is living with you!**
- **Income decrease:** An interim review will be done if your income goes down by 10% or more from the amount at your last yearly review. Some PHAs will have a rule to do an interim review for smaller income decreases, like 5%.
- **Income increase:** Under the new rules you only need an income review for increases in unearned income of 10% or more. You generally do not need an interim review for an increase in **earned income** (including wages, tips, and salary). Instead, an increase in earned income will be counted at the next regular review. However, there are exceptions so you should check with your PHA.

Be sure to report any changes in income as soon as they happen. Reporting on time might mean you pay less rent sooner. If you report on time, you could start paying a lower rent the next time the rent is due or get 30 days' notice if you have to pay more. Reporting late could mean you have to back pay the rent increase. Since different PHAs have different rules, always check with your PHA when the people who live with you change, or your income changes.

For related resources see:

hudexchange.info/programs/hotma/hotma-income-and-assets/#resident-resources



HOTMA Resident Fact Sheet: Health, Medical, and Childcare Deductions

*This fact sheet is for families who live in public housing or have Housing Choice Vouchers from Section 8. There are new rules for deductions because of a federal law, the Housing Opportunity Through Modernization Act of 2016 (HOTMA). Your local public housing agency (PHA) will start using these rules by January 1, 2025. Your PHA will tell you before these changes begin. This fact sheet is **not official** or required by HUD or your PHA.*

Overview

You generally pay 30% of your **adjusted** income as rent. This can be more in the HCV program if your rent is greater than the PHA's payment standard. Adjusted income is what's left after the PHA takes out certain income and costs from your yearly family income. These are called deductions. This fact sheet covers changes to common deductions.

Medical Expenses: Previously, if you were eligible and spent more than 3% of your yearly income on certain medical expenses, you received an income deduction. The PHA would deduct the amount you spent on those medical expenses above 3% of your income. **New rules change this to 10%, meaning that fewer medical expenses will be deducted and your portion of the rent could increase.** To help families, this change will be made over two years. Also, a new hardship deduction allows families who cannot pay rent due to a hardship to deduct more medical expenses for a time.

Childcare Expenses: Previously, childcare costs were only deducted from your income if they allowed a family member to work, look for work, or go to school. The new rule **adds** a hardship exemption for families who still need childcare but are not in work or school. If you qualify, childcare expenses can continue to be deducted from your annual income calculation.

Health and Medical Expense Deduction

The new rules require that qualifying health or medical expenses over 10% of your family's yearly income be deducted from your annual income total. This lowers your adjusted income and your rent.

There are two types of qualifying expenses:

1. Health and medical care expenses of elderly or disabled families.
2. Reasonable attendant care and equipment expenses for family members with a disability. Equipment can include expenses for things like a wheelchair or an assistance animal. The care or equipment must



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allow a family member, including the person with a disability, to work. The amount deducted is capped at the amount earned by the person who was able to work.

Expenses that are reimbursed, for example by your insurance, do not qualify.

If you have qualifying expenses over 10%, you likely qualify for a deduction. If you have qualifying expenses over 5% (but less than 10%) and are unable to pay the rent, talk to your PHA. You may qualify for a hardship exemption. You can use the [Income Estimation Tool](#) to see what amount of expenses would exceed 5% and 10% of your income.

Example

| | |
|---|----------|
| Total annual income: | \$20,000 |
| 10% of annual income: | \$2,000 |
| Qualifying expenses: | \$3,000 |
| Minus the 10% threshold of | \$2,000 |
| = \$1,000 reduction in your adjusted income (the amount over 10% of your income) | |

Hardship Exemptions to the Medical Expenses Deduction

HUD established two hardship exemptions for the new 10% threshold on medical expenses. The exemptions allow more expenses to be deducted for a limited time.

Category 1: Phased in Relief

If you previously had a deduction for medical expenses over 3% of your income, your adjusted income and your rent could increase under the new rules. To help, this increase will happen over two years.

- **1st year:** PHA will deduct eligible expenses over 5% of your family's income.
- **2nd year:** PHA will deduct eligible expenses over 7.5% of your family's income.
- **3rd year:** PHA will deduct eligible expenses over 10% of your family's income.

You might also qualify for the new general hardship deduction.

Category 2: General Financial Hardship

- If your family is struggling to pay rent and you do not qualify for an interim income review, you may qualify for a general hardship exemption. For example, you might qualify if your family had a small decrease in income, a change in who lives in the home, or more medical expenses.
- If so, you will get a deduction for all eligible expenses over 5% of your yearly income.
- The exemption ends when the hardship ends or after 90 days, whichever comes first.
- Your PHA's rules might allow 90-day extensions while the hardship continues.
- This deduction is available at any time.
- During year 2 of the phase-in, if you have a hardship and choose to use this exemption, qualifying expenses over 5% of your income are deducted (instead of 7.5%). Once this period ends, only expenses over 10% would be deducted.

Childcare Expense Deduction

New HUD rules add a hardship exemption for some families who need childcare but are not working, looking for work, or in school.

To qualify, your family must:

- Already be receiving the childcare deduction.
- Show that you cannot afford rent without the deduction and that the lack of childcare would cause hardship.

For example, if you needed childcare to work but had to quit your job to care of a sick family member and still need childcare.

Exemptions are granted for 90-day periods. Your PHA's rules might allow 90-day extensions while the hardship continues.

Related Resources

- [Income Estimation Tool and Directions](#)
- [HOTMA Income and Assets Training Series](#)
- [Hardship Exemptions Resource Sheet](#)
- [Examples of Medical Expenses That Are Deductible and Nondeductible](#)



HOTMA Resident Fact Sheet: Asset and Real Property Limitations

This fact sheet is for families who live in public housing or have Housing Choice Vouchers from Section 8 (HCV). There are new rules that limit the assets and property that families can have when applying to and, in some cases, participating in these housing programs. The new rules are based on a federal law, the Housing Opportunity Through Modernization Act of 2016 (HOTMA). Your local public housing agency (PHA) will start using these rules by January 1, 2025. Your PHA will tell you before the changes begin. This fact sheet is not official guidance or required by HUD or your PHA.

New rules from HUD (the Department of Housing and Urban Development) say that families living in public housing and participating in the housing choice voucher program (HCV or Section 8) cannot have more than **\$100,000*** worth of net family assets. Also, participating families may not own a home that they could live in. **There are notable exceptions to these rules!**

These new rules apply to **all new applicants** to public housing and Section 8. PHAs must deny applicants with assets or property that are over the limit.

PHAs can decide on a policy for how they will apply the rules to **existing residents** at annual and interim reviews. Through a written policy, the PHA can choose to:

- Not enforce the limits at all for existing residents.
- Strictly enforce the limits.
- Enforce the limits but allow residents time to come into compliance.
- Have exceptions to the limits.

Most families will not be impacted by the asset limitation rules. If you're not sure, ask your PHA if these new rules apply to you.

Assets

Assets refer to anything valuable you own, such as jewelry, stocks, tools, artwork, or a vehicle. A common asset is real property (real estate), such as land or housing. "Net family assets" refers to the cash value of all assets owned by the family, after subtracting any money you owe on the assets and any reasonable costs that you would have to pay to sell them. Although the new rules say that you can only have assets up to

** As adjusted annually for inflation.*



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\$100,000* in value, there are many things that HUD has excluded. Anything that's excluded is not counted toward the net family assets total.

Some common examples of assets that are **excluded** from the total limit of \$100,000* include:

- **Necessary items.** Items you need to keep up, use, and live in your home or that you need for work, education, or health. This might be a car that you use to get to work, an expensive medical device, or a laptop you use for school. Whether a specific item is considered “necessary” will depend on the family’s circumstances. HUD has provided guidance in [Notice PIH 2023-27](#).
- **Non-necessary items of personal property, if the combined total value is not more than \$50,000*:** Examples include: a recreational boat, coin collection, or antique jewelry. This will include most assets you own that are not a home (see the section below) or a necessary item. To get this exemption, the total value of all these items must be \$50,000* or less.
- **Retirement accounts.** This covers IRS-recognized retirement plans, such as an IRA, 403(b), or 401(k). The value of the account is not included as an asset.
- **Educational savings accounts.** This includes IRS-recognized educational savings and tuition accounts, as well as any “baby bonds” programs funded by federal, state, or local governments.
- **Interest in Indian trust land.** Interest in land held in a trust by the Bureau of Indian Affairs cannot be counted towards the asset limitations.
- **Tax refunds and credits for 12 months after they are received.** This includes the Earned Income Tax Credit (EITC).
- **Equity in a home owned through the HCV homeownership program,** or a manufactured home when the family receives HCV assistance to rent the space.
- **Property that you cannot legally sell.** This could include property that is the subject of a legal dispute.

Certification: If the assets you own add up to less than **\$50,000***, including land or property, your PHA may accept a self-certification when you move-in and two out of every three years. Not all PHAs will accept a self-certification. If your PHA does allow self-certification, you will need to certify that your assets do not exceed \$50,000* and share how much income you expect to earn from those assets. Regardless of your PHA’s policy, they must fully verify your family assets at least once every three years, using third-party documentation. Some PHAs will fully verify assets every year.

You can use the [Assets and Real Property Limitations Worksheet](#) to help you determine the value of your assets.

Real Property

The new rules state that residents may not own property that is “suitable” for them to live in, with some exceptions. This is separate from the \$100,000* net family assets limitation. If you own a property that you **cannot** live in, its value may still be included in your net family assets (explained above).

Several factors affect whether a house is suitable to live in. If you cannot live in the home, then owning it will not affect your eligibility for the housing program, unless the value puts you above the asset limit.

**As adjusted annually for inflation.*

A property may **not be suitable** for your family to live in if it:

- Is unsafe because of its condition (unless the issues can be easily fixed).
- Does not meet the disability-related needs of your family. For example, the house has too many stairs or is not close to public transportation.
- Is in a location that would cause hardship. For example, the house is located too far from your work or school.
- Is not big enough for your family.
- Is not a home you are legally allowed to live in. For example, a building in an area zoned for commercial use only.

The limit on owning a home does not apply if you:

- Get assistance for that home under the Housing Choice Voucher Program.
- Co-own that home with someone who lives in it (and that person is not part of your family in the housing program).
- Are currently selling the home.
- Are a victim of domestic violence, dating violence, sexual assault, or stalking. (This includes any member of your family.)

What happens if your PHA finds that your assets value more than \$100,000* or you own a home that you could live in?

The answer depends on which written policy your PHA has related to the asset and property limits.

If your PHA strictly enforces the limit: You will no longer be able to participate in the public housing or HCV program. If you do not move, the PHA will start the termination or eviction process. Depending on your PHA's policy, they may wait up to 6 months before beginning the termination process.

If your PHA offers an option to fix the issues (cure): Some PHAs will enforce the limits but will allow families up to 6 months to come into compliance. That means you will have 6 months to fix the issue so that you are no longer over the asset or property limit. How you do this will depend on what assets or property you have. You may be able to transfer money to an account that is not included as an asset (like a retirement account) or sell your home. Contact your PHA for their specific rules.

If your PHA does not enforce the limit: Some PHAs will have a policy to not enforce the asset and real property limits. In that case, being "out of compliance" with this rule will not affect you. However, the PHA will still need to ask about and calculate the value of your assets.

Exceptions: As a part of their policy, your PHA can establish exceptions to the asset and property limits based on certain traits like age, disability, or income. For example, your PHA might have a strict enforcement policy, except for families that are considered extremely-low income. For those families, the PHA could have a policy to not enforce the asset limits.

For related resources see:

hudexchange.info/programs/hotma/hotma-income-and-assets/#resident-resources

* As adjusted annually for inflation.

I. PHA Compliance with HOTMA Sections 102 and 104

A. HUD Enforcement Prior to July 1, 2025

1. Earned Income

Disregard Regulation:

24 CFR 5.611

PHAs must have ceased enrolling families into the Earned Income Disregard (EID) as of December 31, 2023. EID will not apply to any family that was not eligible for and already participating in the disregard as of December 31, 2023. Please refer to Notice PIH 2023-27, Attachment G, Section G.20, for guidance on the end of EID.⁶

2. Form HUD-9886-A

Regulation: 24 CFR 5.230, 5.232

PIH communicated by letter on February 23, 2024, that PHAs may begin having families sign the new Form HUD-9886-A (Authorization for the Release of Information/Privacy Act Notice) on January 1, 2024. The Form HUD-9886-A instructs readers to use the HUD-9886-A for reexaminations effective on or after January 1, 2024, and to use Form HUD-9886 for reexaminations effective prior to January 1,

A. HUD Enforcement Beginning July 1, 2025

This Notice identifies additional provisions in Sections 102 and 104 of HOTMA that PHAs must comply with no later than July 1, 2025. HUD has determined that PHAs can comply with these specific provisions while they remain in IMS/PIC, prior to the availability of HOTMA-compliant HUD-50058 forms in HIP. All transactions with an effective date on or after July 1, 2025, must be processed using these HOTMA policies. Since the reexamination process typically starts 90-120 days prior to the effective date of the transaction, this means that PHAs may need to utilize such policies in reexaminations as soon as March 3, 2025.

This compliance deadline does not apply to other provisions, which require systems development. For provisions not on this list, HUD either identified technical obstacles in IMS/PIC that PHAs would encounter when trying to report HUD-50058 transactions that used such provisions, or the provision is closely linked to other HOTMA provisions that have similar obstacles. For example, HOTMA raised the

Elderly/Disabled Family deduction to \$525 effective January 1, 2024, but PHAs in IMS/PIC are unable to comply with this change, because they are unable to submit transactions at the higher amount.

PHAs may immediately begin complying with HOTMA provisions identified below, once they have made any necessary updates to their materials and processes. HUD encourages PHAs to consult with their software vendors prior to beginning to implement these provisions, to ensure HUD-50058 transactions are submitted successfully.

1. Income Exclusions

Regulation: 24 CFR

5.609(b)

PHAs may immediately begin to implement income exclusions in 24 CFR 5.609(b), on all income examinations including at new admissions, annual, or interim reexaminations. For all income examinations with an effective date on or after July 1, 2025, PHAs must utilize the list of income exclusions. Please note that Notice PIH 2023-27 does not reference all income exclusions, but rather provides guidance on

new or revised income exclusions. For the full list of income exclusions, please refer to the regulations at 24 CFR 5.609(b).

Please refer to Notice PIH 2023-27, Attachment G, for guidance on the following new and revised exclusions:

- Nonrecurring Income (24 CFR 5.609(b)(24))
- Lump-Sum Additions to Net Family Assets (24 CFR 5.609(b)(24)(vii))
- Income Earned on Amounts Placed in a Family's Family Self Sufficiency (FSS) Account (24 CFR 5.609(b)(27))
- Income of Live-in Aides, Foster Children, and Foster Adults (24 CFR 5.609(b)(8))
- Payments Received for the Care of Foster Children or Foster Adults or State or Tribal Kinship or Guardianship Care Payments (24 CFR 5.609(b)(4))
- Insurance Payments or Settlements (24 CFR 5.609(b)(5))
- Civil Action Recoveries or Settlements (24 CFR 5.609(b)(7))
- Earned Income of Dependent Full-Time Students (24 CFR 5.609(b)(14))
- Adoption Assistance Payments (24 CFR 5.609(b)(15))
- Veterans Regular Aid and Attendance (24 CFR 5.609(b)(17))
- Home-Based Care Payments for a Family Member(s) with one or more Disabilities (24 CFR 5.609(b)(19))

- Loan Proceeds (24 CFR 5.609(b)(20))
- Certain Payments Received by Tribal Members (24 CFR 5.609(b)(21))
- Exclusions from Other Federal Statutes (24 CFR 5.609(b)(22))
- Replacement Housing Gap Payments (24 CFR 5.609(b)(23))
- Student Financial Assistance (24 CFR 5.609(b)(9))
- Achieving a Better Life Experience (ABLE) Accounts (24 CFR 5.609(b)(22))
- Income and Distributions from Coverdell Education Savings Accounts, 529 Accounts, and “Baby Bond” Accounts (24 CFR 5.609(b)(10))
- Gross Income from Self-Employment or Operation of a Business (24 CFR 5.609(b)(24) and 5.609(b)(28))
- Civil Rights Settlements or Judgments (24 CFR 5.609(b)(25))

Please refer to Notice PIH 2023-27, Attachment F, Section F.4.d.iii for guidance on the income exclusion at 24 CFR 5.609(b)(2):

- Certain distributions of irrevocable trusts or revocable trusts outside the control of the family or household (including most Special Needs Trusts) (24 CFR 5.609(b)(2))

Note that adoption of some new or revised definitions below may affect the calculation for certain income exclusions. For example, the revised definition of the term “health and medical care expenses” may affect the income exclusion at 24 CFR 5.609(b)(6):

- Amounts for or in reimbursement of the cost of health and medical care expenses (24 CFR 5.609(b)(6))

3. Definitions

Regulation: 24 CFR 5.100, 5.403, 5.603

PHAs may immediately begin to use the following definitions. For all transactions with an effective date on or after July 1, 2025, PHAs must use these definitions.

- “Earned income” and “unearned income” (24 CFR 5.100). Please refer to Notice PIH 2023-27, Attachment F, Sections F.2 and F.3 for guidance on these definitions.
- “Family” (24 CFR 5.403). Please refer to Notice PIH 2023-27, Attachment E, Section E.1 for guidance on the definition of family.
- “Day laborer,” “independent contractor,” and “seasonal worker” (24 CFR 5.603). Please refer to Notice PIH 2023-27, Attachment F, Sections F.2.a, F.2.b, and F.2.c for guidance on these definitions.
- “Dependent” (24 CFR 5.603). Please refer to Notice PIH 2023-27, Attachment E, Section E.2 for guidance on the revision to this

definition.

- “Foster child” and “foster adult” (24 CFR 5.603). Please refer to Notice PIH 2023-27, Attachment E, Section E.2 for guidance on these definitions. **Note:** The definitions of “foster child” and “foster adult” were added to 24 CFR 982.4 as part of a final rule published on May 7, 2024 (“Housing Opportunity Through Modernization Act of 2016-Housing Choice Voucher (HCV) and Project-Based Voucher Implementation; Additional Streamlining Changes,” 89 FR 38224), and this rule did not have a delayed compliance date.⁷ For the Housing Choice Voucher program [including Project-Based Vouchers], PHAs must already be implementing the definition of “foster child” and “foster adult”.
- “Health and medical care expenses” (24 CFR 5.603). Please refer to Notice PIH 2023-27, Attachment C, Section C.3.b for guidance on this definition.
- “Minor” (24 CFR 5.603).

4. De Minimis Errors

Regulation: 24 CFR 5.609(c)(4); 882.515(f); 882.808(i)(5); 960.257(f); and 982.516(f)

Please refer to Notice PIH 2023-27, Attachment B, Section B.4 for guidance on de minimis errors, which includes guidance on when PHAs must take corrective action to credit or repay a family.

B. Summary of Compliance Requirements

The table below summarizes the provisions of Sections 102 and 104 of HOTMA identified in this Notice and their respective compliance deadlines.

| Provisions | Required Compliance Date |
|---|--------------------------------|
| Ceasing Enrollment into Earned Income Disregard (EID) | January 1, 2024 |
| Use of HUD-9886-A | No later than February 1, 2025 |
| Income Exclusions | No later than July 1, 2025 |
| Definitions | No later than July 1, 2025 |
| De Minimis Errors | No later than July 1, 2025 |

HUD will not be enforcing compliance with any other provision by January 1, 2025.⁸ HUD will issue further guidance on the compliance deadline for all other provisions, when there is more information about when PHAs will be able to submit HOTMA-compliant HUD- 50058 forms in HIP.

II. Further Information

Questions concerning this notice should be submitted by email to the following Office of Public Housing and Voucher Programs mailbox: HOTMAQuestions@hud.gov.

ADMISSIONS AND CONTINUED OCCUPANCY/ACOP

Reasonable Accommodation /504 Requests

Section 504 of the Rehabilitation Act of 1973 is a federal law, codified at 29 U.S.C. § 794, that prohibits discrimination on the basis of disability in federally-assisted programs.

HAC has updated its ACOP (housing policies and procedures) to clarify how reasonable accommodation/504 requests are handled. Core features of the updates include:

- 504 coordination duties have been assigned to a HAC staff member.
- All HAC employees will share in the responsibility of ensuring reasonable accommodation requests are addressed appropriately.
- The ultimate oversight of 504 compliance activities is the responsibility of the Executive Director.
- HAC has updated and/or clarified its staff training, policies and procedures, communications strategies, record-keeping, and complaint procedures surrounding its handling of reasonable accommodation/504 requests.



**HOUSING AUTHORITY
OF COVINGTON**
better futures
Flat Rents Effective July, 1st 2025

| <u>Golden Tower:</u> | <u>Previous</u> | <u>Proposed</u> |
|-----------------------------|------------------------|------------------------|
| Efficiency-03,04 | \$729 | \$827 |
| 1BRM (corners)-01,02,12,13 | \$797 | \$901 |
| 1BRM (interior)-05,06,10,11 | \$827 | \$931 |

Latonia Terrace:

| | | |
|------|--------|--------|
| 1BRM | \$827 | \$931 |
| 2BRM | \$1076 | \$1207 |
| 3BRM | \$1429 | \$1596 |

Academy Flats:

| | | |
|---------------------|-------|-------|
| 1BRM (PHA/Section8) | \$827 | \$931 |
|---------------------|-------|-------|

ESR 1,2,3,NSP,Emery

| | | |
|------|--------|--------|
| 1BRM | \$827 | \$931 |
| 2BRM | \$1076 | \$1207 |
| 3BRM | \$1429 | \$1596 |



BETTER FUTURES





Effective July 1, 2025 security deposits will be as follows for incoming residents:

Non-Elderly/non-disabled/family household: **\$700**

Elderly or disabled household: **\$500**

Deposits may be split into two (2) payments. First payment is due at lease signing, second payment is due with next rent payment.

NOTE ABOUT THE CALCULATION METHODS USED FOR YOUR RENT PAYMENT:

Tenants are given a choice between Flat Rent and Income-Based Rent (30% of income) during their annual recertification process.

Flat Rent may be beneficial for households with higher annual incomes. It "caps" the amount of rent charged to 80% of the area's Fair Market Rent (FMR). Flat Rent only requires tenants to verify their household income and assets every 3 years, though household composition must still be verified annually.

In contrast, Income-Based Rent may be beneficial for households with lower annual incomes. Income-Based Rent requires tenants to verify their household income, assets and household composition annually.

Whatever rent calculation method chosen, a tenant's monthly rent charges will never exceed 30% of their annual income.





DATE January 24, 2025
TO: HAC Staff and Resident Council Annual/5Y Capital Fund Plan Meeting
FROM: Sharon Brown, Property Management
RE: Additions to Management Policies

Community Room/Recreation Hall:

- Rentals shall not exceed a 4-hour time limit unless otherwise approved by management.
- The maximum occupancy shall not exceed 128 persons at Golden Tower and 62 persons at Latonia Terrace.

Pest Control and Extermination:

- Treatment will not occur if a minor is home alone and unsupervised. There will be a charge for a return visit.

Curb Appeal Rules for Clean & Safe Communities:

- Open and Closed sided tents or canopies must be taken down and stored inside the resident's apartments. They are not to be left set up when not in use.
- Latonia Terrace garbage is picked up on Monday's
- Golden Tower garbage chutes are located on each floor along with an outside dumpster container.
- All other properties, please contact Rumpke for proper pick-up day.

Resident Parking Policy:

- The gated lot at Golden Tower is for properly permitted vehicles. In the event a resident has more than one vehicle that has a permit (grandfathered from the old policy), only one vehicle may be parked in the gated lot at any given time.



| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|-----------------|--|------------------|------------------|------------------|------------------|------------------|
| | Operations- CH, LT, GT, ESR I, AF & NSP | 601,563 | 606,490 | 611,338 | 616,118 | 619,242 |
| | Operations- Emery | 4,971 | 5,219 | 5,480 | 5,754 | 6,042 |
| | Operations- ESR II | 2,895 | 3,039 | 3,192 | 3,351 | 3,519 |
| | Operations - ESR III | 2,746 | 2,883 | 3,027 | 3,179 | 3,338 |
| | Operations- River's Edge at Eastside Pointe | 16,065 | 16,868 | 17,712 | 18,597 | 19,527 |
| | Operations- Work truck, Pickup truck, Gater, etc. | 26,000 | 26,000 | 26,000 | 26,000 | 26,000 |
| | Operations- Trees | 1,700 | 1,700 | 1,700 | 1,700 | 1,700 |
| | 2300- Furniture, microwave, refrigerator, etc. | 100 | 100 | 100 | 100 | 100 |
| | 2300 HVAC | 100 | 100 | 100 | 100 | 100 |
| | 2300- Carpet upgrade and drywall/paint | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL OPERATIONS | 656,240 | 662,499 | 668,749 | 674,999 | 679,668 |
| | | | | | | |
| | | | | | | |
| PHA Wide | Furniture & Blinds | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Ranges & Refrigerators | 35,000 | 40,000 | 40,000 | 40,000 | 40,000 |
| | Management Improvements- Staff & Education/Training / Correct Deficiencies | 65,000 | 63,750 | 67,750 | 73,750 | 73,750 |
| | * Training of HAC staff in operations, maintenance, accounting & financial procedures | | | | | |
| | * Training residents for agency or community employment. Teen Summer Work Program | | | | | |
| | * Correct management deficiencies. Improvements to management, financial & accounting control procedures. * Technical assistance to Resident Council | | | | | |
| | * Development and improvement of applicant screening procedures | | | | | |
| | Management Improvement- Security (signage, cameras, key machines, locks, etc.) | 112,500 | 112,500 | 108,500 | 102,500 | 102,500 |
| | Management Improvement- Systems (software, copiers, telecom, etc.) | 54,229 | 53,750 | 53,750 | 53,750 | 53,750 |
| | REEP Management Improvement- Systems (software, copiers, telecom, etc.) | 7,000 | 7,000 | 7,000 | 7,000 | 7,000 |
| | Administration (Salaries/Benefits- CF related) | 111,900 | 120,120 | 116,785 | 122,297 | 127,916 |
| | Consultant Fees | 40,000 | 40,000 | 40,000 | 40,000 | 40,000 |
| | Consultant fees- Choice Neighborhood and/or Housing Development | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | Architecture and Engineering Fees | 261,487 | 100,000 | 100,000 | 100,000 | 100,000 |
| | Development/Renovation of Purchasing Department/ Site work/ Relocation | 9,600 | 9,600 | 9,600 | 9,600 | 9,600 |
| | Development/ Renovation of Maintenance Shop / Offices / Site work/ Relocation | 20,000 | 40,000 | 50,000 | 60,000 | 60,000 |
| | Housing Development- Planning, Design, Finance, Demo, Abatement, Acquisition, Construction, Relocation, etc. | 215,620 | 269,476 | 276,227 | 273,865 | 282,697 |
| | Land Development | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | Audit Costs for Capital Fund program | 4,000 | 4,000 | 4,000 | 4,000 | 4,000 |
| | SUBTOTAL PHA WIDE EXCLUDING OPERATIONS | \$957,336 | \$881,196 | \$894,612 | \$907,762 | \$922,213 |

| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|---|---|------------------|------------------|------------------|------------------|------------------|
| GOLDEN TOWER | Replace acoustical ceiling | 4,900 | 4,900 | 4,900 | 4,900 | 4,900 |
| | Electrical/LED lighting (Units and Non Dwelling) | 15,000 | 15,000 | 15,000 | 15,000 | 15,000 |
| | Replace sanitary sewer lines and stacks (Units, Non Dwelling & Site) | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | Replace waterlines, valves, backflow preventer, water heaters and pumps (Unit, Non dwelling and Site) | 15,000 | 15,000 | 15,000 | 15,000 | 15,000 |
| | Storm line upgrades | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Replace toilets- energy efficient (Units and Non Dwelling) | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Replace all bath fixtures (toilets, showers, controls, cabinets, sinks and faucets) | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| | Replace roof system and flashing | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Paint corridors and stairwells / Replace common area flooring | 15,000 | 15,000 | 15,000 | 15,000 | 15,000 |
| | Upgrade apartment and common area flooring | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| | Replace windows, screens, and caulk | 40,000 | 40,000 | 40,000 | 40,000 | 40,000 |
| | Replace kitchen cabinets, countertops, sinks, faucets and range hoods | 25,000 | 25,000 | 25,000 | 25,000 | 25,000 |
| | Replace door handles from knobs to lever arm in stairwells | 7,500 | 100 | 100 | 100 | 100 |
| | Elevator upgrades (cab upgrades, braille buttons, hoist and governor replacement, door operator, protection system, etc.) | 49,000 | 49,000 | 49,000 | 49,000 | 49,000 |
| | Concrete / Asphalt and stripping | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| | HVAC & Dampers- common area and PTAC units | 14,700 | 14,900 | 14,900 | 14,900 | 14,900 |
| | Mailboxes, package lockers, etc. | 100 | 100 | 100 | 100 | 100 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE protocol) | 100 | 100 | 100 | 100 | 100 |
| | Tuck-pointing / Caulking / Exterior painting/Window cleaning | 100 | 100 | 100 | 100 | 100 |
| | Unit & Building Renovation/Modernization/Relocation | 13,000 | 12,700 | 12,700 | 12,700 | 12,700 |
| Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 | |
| Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 | |
| PNA Assessment | 100 | 100 | 100 | 100 | 100 | |
| Security Cameras | 100 | 100 | 100 | 100 | 100 | |
| SUBTOTAL GOLDEN TOWER | | \$284,800 | \$277,300 | \$277,300 | \$277,300 | \$277,300 |

| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|-----------------|---|------------------|------------------|------------------|------------------|------------------|
| LATONIA TERRACE | Storm doors and hardware | \$100 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Electrical/LED lighting (Units, Non dwelling and Site) | 14,900 | 15,000 | 15,000 | 15,000 | 15,000 |
| | Water lines, valves, pumps and water heaters (Units, Non Dwelling and Site) | 15,000 | 15,000 | 15,000 | 15,000 | 15,000 |
| | Replace sewer lines (Units, Non Dwelling, and Site) | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Replace storm lines, catch basins, conductor lines, gutters/downspout, retention basin, drain tile, and erosion control | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| | Replace cabinets, sinks, tub, surround, controls and toilets at bathrooms | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| | Gas lines, valves and cathodic protection (Units and Site) | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Replace HVAC (Boilers, radiators, heat lines, valves or upgrade to split or chiller systems) | 60,000 | 55,000 | 55,000 | 55,000 | 55,000 |
| | Replace windows, screens and blinds | 50,000 | 50,000 | 50,000 | 50,000 | 50,000 |
| | Repair brick and mortar and seal concrete block | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Replace cabinets, countertops, sinks, faucets at kitchens | 30,000 | 30,000 | 30,000 | 30,000 | 30,000 |
| | Install exhaust fan and lights | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 |
| | Upgrade apartment and common area flooring | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Upgrade accessible concrete ramps and railings | 100 | 100 | 100 | 100 | 100 |
| | Stabilize and/or construct retaining walls. Fencing at top of wall. | 8,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| | Install bathroom medicine cabinets with lights | 100 | 100 | 100 | 100 | 100 |
| | Concrete / Asphalt and stripping | 100 | 100 | 100 | 100 | 100 |
| | Replace or repair playground equipment and ground cover | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE protocol) | 15,000 | 15,000 | 15,000 | 15,000 | 15,000 |
| | Upgrade administration restroom at 2940 Madison | 100 | 100 | 100 | 100 | 100 |
| | Replace crawl space vents to prevent pest infiltration/ Seal penetrations in buildings to prevent pest infiltration | 100 | 100 | 100 | 100 | 100 |
| | Replace A/C units in community room | 100 | 100 | 100 | 100 | 100 |
| | Install measures or structure to prevent flooding of administration basement at 2940 Madison | 100 | 100 | 100 | 100 | 100 |
| | Regulators and Sensors/ Main water line relocation & pit | 10,000 | 100 | 100 | 100 | 100 |
| | Auto read electric meters | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Unit & Building Renovation/Modernization/Relocation/New Construction | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Lead Based paint assessment/Abatement & Relocation of Residents | 11,800 | 54,500 | 54,500 | 54,500 | 54,500 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | Security Cameras | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL Latonia Terrace | \$313,800 | \$358,600 | \$358,600 | \$358,600 | \$358,600 |

| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|---------------------|---|-----------------|-----------------|-----------------|-----------------|-----------------|
| CITY HEIGHTS | City Heights Consultants for Disposition | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Relocation due to Disposition (DOT schedule and moving expenses, relocation consultant, resident utility debts, etc.) | 250 | 250 | 250 | 250 | 250 |
| | Clean out and secure vacant units due to Relocation due to Disposition | 250 | 250 | 250 | 250 | 250 |
| | Electrical, Load centers, disconnects, conduit and wiring | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | Utility poles and components | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | Storm and sanitary systems (Units, Non Dwelling and Site) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 |
| | Water lines, valves and water heaters (Units, Non dwelling and Site) | 14,300 | 14,300 | 14,300 | 14,300 | 14,300 |
| | Gas lines, valves and cathodic protection (Units and Site) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 |
| | Concrete / Asphalt and stripping | 14,500 | 14,500 | 14,500 | 14,500 | 14,500 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE protocol) | 100 | 100 | 100 | 100 | 100 |
| | Asbestos/ Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | HVAC systems | 100 | 100 | 100 | 100 | 100 |
| | Security cameras (Installation and removal) | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL CITY HEIGHTS | \$82,900 | \$82,900 | \$82,900 | \$82,900 | \$82,900 |
| EMERY DRIVE | Replace kitchen/ bath cabinetry, sinks, faucets, countertops. | 1,000 | 500 | 500 | 500 | 500 |
| | LED lighting, emergency exit lighting and electrical (Site, Units and Non Dwelling) | 500 | 500 | 500 | 500 | 500 |
| | Water lines, valves, apartment shutoff valves, water heaters, etc. / Sewer & Storm | 1,600 | 1,814 | 2,047 | 3,159 | 4,327 |
| | Replace bathtubs, surrounds, and controls | 2,000 | 3,000 | 3,000 | 3,000 | 3,000 |
| | Upgrade apartment and common area flooring | 3,282 | 3,577 | 4,404 | 4,404 | 4,404 |
| | Upgrade Boiler and HVAC (Units and Non Dwelling) | 1,200 | 1,200 | 1,200 | 1,200 | 1,200 |
| | Upgrade windows, paint and caulking | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| | Upgrade patio doors, decks and railings | 2,000 | 3,000 | 2,000 | 2,000 | 2,000 |
| | Building Envelope- roof, gutters, downspouts, siding, soffits, trim, tuckpointing, exterior painting, caulking, wall & attic insulation, etc. | 2,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Replace metal stair at 1016 / Replace fire escapes at 1020 and 1030 | 1,300 | 1,800 | 1,800 | 1,800 | 1,800 |
| | Stabilize erosion and hillside slippage | 2,000 | 1,000 | 2,000 | 2,000 | 2,000 |
| | Upgrade laundry facilities (6 washers and 8 dryers) | | | | | |
| | Water infiltration system | 900 | 400 | 400 | 400 | 400 |
| | Smoke detectors / carbon monoxide detectors (NSPIRE protocol) | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | Unit & Building Renovation/Modernization/Relocation/New Construction | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL EMERY DRIVE | \$20,182 | \$21,191 | \$22,251 | \$23,363 | \$24,531 |

| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|-----------------|--|-----------------|-----------------|-----------------|-----------------|-----------------|
| ESR I | Concrete / Asphalt/ Stripping | 100 | 100 | 100 | 100 | 100 |
| | MEP- HVAC / Electrical (includes Lighting) / Plumbing (waterlines, valves, water heaters, etc.)/Sewer & Storm | 12,000 | 12,000 | 12,000 | 12,000 | 12,000 |
| | Replace kitchen/ bath cabinetry, countertops, sinks and faucets. | 17,900 | 17,900 | 17,900 | 17,900 | 17,900 |
| | Building Envelope- windows, roofs, gutters, downspouts, siding, soffits, trim, tuck-pointing, exterior painting, caulking, seal penetrations from pest and provide on way egress, etc. | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Upgrade apartment and common area flooring | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE protocol) | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Waterproof basement walls / Cap basement dirt floors with concrete | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Fencing | 900 | 900 | 900 | 900 | 900 |
| | Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | Replace Beam and Floor Joists | 100 | 100 | 100 | 100 | 100 |
| | Unit & Building Renovation/Modernization/Relocation/New Construction | 100 | 100 | 100 | 100 | 100 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL ESR I | \$35,400 | \$35,400 | \$35,400 | \$35,400 | \$35,400 |
| ESR II | Building Envelope- windows, roofs, gutters, downspouts, siding, soffits, trim, tuck-pointing, wall & attic insulation, exterior painting and caulking | 3,599 | 4,564 | 5,046 | 5,046 | 5,046 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE Protocol) | 100 | 100 | 100 | 100 | 100 |
| | MEP- HVAC / Electrical (includes Lighting) / Plumbing (waterlines, valves, water heaters, etc.) | 1,500 | 2,160 | 2,334 | 3,023 | 3,746 |
| | Replace kitchen/ bath cabinetry, countertops, sinks & faucets. | 100 | 100 | 100 | 100 | 100 |
| | Concrete / Asphalt/ Stripping | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Fencing | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Lead Based paint assessment/abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | Sewer/Storm Replacement | 4,900 | 3,900 | 3,900 | 3,900 | 3,900 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | Unit & Building Renovation/Modernization/Relocation | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL ESR II | \$12,599 | \$13,224 | \$13,880 | \$14,569 | \$15,292 |
| ESR III | Building Envelope- windows, roofs, gutters, downspouts, siding, soffits, trim, tuck-pointing, wall & attic insulation, exterior painting and caulking | 4,984 | 5,423 | 5,280 | 5,280 | 5,280 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE Protocol) | 100 | 100 | 100 | 100 | 100 |
| | MEP- HVAC / Electrical (includes Lighting) / Plumbing (waterlines, valves, water heaters, etc.) | 1,000 | 1,630 | 1,770 | 2,397 | 3,055 |
| | Replace kitchen/ bath cabinetry, countertops, sinks & faucets. | 100 | 100 | 100 | 100 | 100 |
| | Concrete / Asphalt/ Stripping | 1,000 | 500 | 1,000 | 1,000 | 1,000 |
| | Fencing | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Lead Based paint assessment/abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | Sewer/Storm Replacement | 2,900 | 2,900 | 3,000 | 3,000 | 3,000 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | Unit & Building Renovation/Modernization/Relocation | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL ESR III | \$11,484 | \$12,053 | \$12,650 | \$13,277 | \$13,935 |

| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|---|---|------------------|------------------|------------------|------------------|------------------|
| ACADEMY FLATS | HVAC (Units and Non Dwelling) | 55,100 | 65,000 | 65,000 | 65,000 | 65,000 |
| | Exterior painting and caulking | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Concrete/ Asphalt and stripping | 8,000 | 8,000 | 8,000 | 8,000 | 8,000 |
| | Flooring, painting, electrical (lighting) at common areas | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 |
| | Plumbing (waterlines, valves, water heaters, pumps, shower stalls, dishwashers, etc.) | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Upgrade elevator and components | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Waterproof foundation wall | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Shelter/Gazebo | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE Protocol) | 100 | 100 | 100 | 100 | 100 |
| | Replace Windows | 12,500 | 54,600 | 54,600 | 54,600 | 54,600 |
| | Sewers, Storm, catch basins, conductor lines, erosion, etc. | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Upgrade apartment and common area flooring | 1,000 | 1,500 | 1,500 | 1,500 | 1,500 |
| | Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | Replace exterior or interior doors | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| | Seal attic penetrations/ Pest Control | 100 | 100 | 100 | 100 | 100 |
| | Electrical including lighting and emergency lights | 100 | 100 | 100 | 100 | 100 |
| Security Cameras | 100 | 100 | 100 | 100 | 100 | |
| PNA Assessment | 100 | 100 | 100 | 100 | 100 | |
| Unit & Building Renovation/Modernization/Relocation | 100 | 100 | 100 | 100 | 100 | |
| SUBTOTAL ACADEMY FLATS | | \$102,400 | \$154,900 | \$154,900 | \$154,900 | \$154,900 |
| NSP | Concrete / Asphalt/ Stripping | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 |
| | Plumbing (waterlines, valves, water heaters, etc.)/ Sewer & Storm | 7,000 | 8,000 | 8,000 | 8,000 | 8,000 |
| | HVAC/ Electrical (includes Lighting) | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| | Building Envelope- windows, roofs, gutters, downspouts, siding, soffits, trim, tuck-pointing, exterior painting, caulking, fencing, seal penetrations from pest and provide on way egress, etc. | 13,000 | 12,000 | 12,000 | 12,000 | 12,000 |
| | Smoke detectors/ carbon monoxide detectors (NSPIRE protocol) | 100 | 100 | 100 | 100 | 100 |
| | Upgrade apartment and common area flooring | 8,800 | 8,800 | 8,800 | 8,800 | 8,800 |
| | Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | Unit & Building Renovation/Modernization/Relocation | 100 | 100 | 100 | 100 | 100 |
| SUBTOTAL New Site Properties | \$90,300 | \$90,300 | \$90,300 | \$90,300 | \$90,300 | |

| COMMUNITY (AMP) | PROJECT | BUDGET CF25 | BUDGET CF26 | BUDGET CF27 | BUDGET CF28 | BUDGET CF29 |
|-----------------|--|--------------------|--------------------|--------------------|--------------------|--------------------|
| RIVER'S EDGE | Building Envelope- Windows, roofs, gutters, downspouts, siding, soffits, trim, tuck-pointing, exterior painting and caulking | 13,000 | 18,000 | 18,000 | 18,000 | 18,000 |
| | Smoke detectors / Carbon monoxide detectors (NSPIRE protocol) | 100 | 407 | 100 | 100 | 100 |
| | Concrete / Asphalt and stripping | 11,900 | 11,900 | 11,900 | 14,400 | 15,500 |
| | HVAC/ Electrical (includes lighting and emergency lights | 10,000 | 8,000 | 8,000 | 8,000 | 9,500 |
| | Plumbing (waterlines, valves, pumps, water heaters, etc.) | 7,000 | 6,000 | 6,000 | 6,000 | 6,000 |
| | Fencing | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| | Upgrade apartment and common area flooring | 5,259 | 5,830 | 5,830 | 5,830 | 7,830 |
| | Security cameras, security lights, access controls, signage | 5,000 | 5,000 | 8,328 | 9,000 | 7,731 |
| | Ranges & refrigerators (Units) | 3,000 | 3,000 | 3,000 | 3,000 | 3,000 |
| | Lead Based paint assessment/Abatement & Relocation of Residents | 100 | 100 | 100 | 100 | 100 |
| | Accessibility and sensory assessment & correction if needed | 100 | 100 | 100 | 100 | 100 |
| | PNA Assessment | 100 | 100 | 100 | 100 | 100 |
| | SUBTOTAL RIVER'S EDGE at EASTSIDE POINTE | \$57,559 | \$60,437 | \$63,458 | \$66,630 | \$69,961 |
| | GRAND TOTAL AGENCY WIDE | \$2,625,000 | \$2,650,000 | \$2,675,000 | \$2,700,000 | \$2,725,000 |

MEETING NOTES
HOUSING AUTHORITY OF COVINGTON
HAC STAFF AND RESIDENT COUNCIL ANNUAL/ 5 YEAR CAPITAL FUND PLANNING MEETING
Friday January 24, 2025 10:00AM

A meeting of the Latonia Terrace Resident Council and Golden Tower Resident Council regarding the Housing Authority of Covington's Annual Plan and 5 Year Capital Fund projects, was held on **Friday, January 24, 2025, 10:00am** at the agency's administration office, 2300 Madison Ave., Covington, KY 41014. A total of 12 staff members and residents were present at the meeting.

Housing Authority of Covington staff consisted of: Steve Arlinghaus, Executive Director, Chris Bradburn, Deputy Director; Jon Adkins, Director of Resident Services; Shannon Wilson, Senior Housing Manager; Linda DiGirolamo, Procurement Officer/Capital Asset Manager; Gabrielle Pereda, Manager/Leasing & Recertification; Sharon Brown, Housing Manager/Latonia Terrace; Rena Thomas, Leasing/Recertification & 504 Coordinator, April Peacock, Program Manager/Resident Services and Kelly Connett, Executive Assistant to the Executive Director.

Two Resident Council officers were in attendance: Lestelle Turney, Latonia Terrace & Veverly Gibson, Golden Tower.

AGENDA:

- Welcome / Introductions ~ *Chris Bradburn*
- The Resident Board members were informed that the Annual/5 Year Capital Fund Plan will be uploaded online to the HAC website, and a hard copy will be at the administration building, Latonia Terrace and Golden Tower for public viewing.
- Opening Remarks to highlight that many of the changes were initiated by HUD.
(One notation was the addition of a 504 Coordinator. No changes were made in the process, but we tightened up the protocol with Myrena Thomas assuming the position of 504 Coordinator.)
- **Resident Survey ~ Jon Adkins** (*Both Lestelle Turney and Veverly Gibson said they did not see the survey.*)
 - We received 13 responses from resident surveys published on the agency website, social media and through Constant Contact.
 - Positive feedback include price, amenities, convenience.
 - Negative feedback included no central air, old flooring, poor lighting.
 - Jon Adkins asked what changes that they would like to see at their properties:
 - Veverly Gibson said she would like balconies added, more cameras and new bathrooms.
 - Lestelle Turney said she would like a fast-food restaurant added to the property and better security.
 - Both Lestelle Turney and Veverly Gibson suggested sending out another survey and periodic surveys to the properties.
 - Sharon Brown said that they used to include a postcard survey with their move-in packets that the resident could turn in at any time.

- Regarding the application and recertification process, residents rated Good to Excellent.
- Regarding safety, 11 out of 13 residents that submitted said they feel safe at their properties.
 - Lestelle Turney said she has safety concerns at Latonia Terrace.
 - Veverly Gibson said that the lighting and vents in the hallways are “rusty and crusty”.
- Jon Adkins asked both Lestelle Turney and Veverly Gibson, what additional assistance and programs they would like to see going forward:
 - Transportation
 - Transparency and consistency
 - After school programs
 - Drug programs
 - More job fairs
 - Property newsletter with updates
 - Computer class
 - Exercise room
 - Ability to pay rent online

Jon Adkins stated that HAC does have a major Job Fair every year and will discuss with his team other similar options for the future. In addition, Resident Services recently started an after-school program called TRAK at Latonia Terrace. This seems to be well received and making wonderful progress with 6th through 8th graders. The new KIOSKS that were activated this past year will eventually be set up for online payments. This is a very significant change in operations so we must make sure its activation will not cause issues with residents’ rent submissions. The Resident Services Department meets weekly to discuss programs operating now, as well as possible programs to provide residents in the future.

- **Housing Program Updates**

- **Lease ~ Shannon Wilson**

- Section 12: Pest Control Refusal – Fee changes from \$45 to \$100, with notice of lease termination.
- Section 15: Over/Under Housed – Tenants will be notified at the move-in that they will be subject to move at their expense if their household size changes.

- **Admissions and Continued Occupancy Policy (ACOP) ~ Gabrielle Pereda**

- HUD/HOTMA – PH/HCV changes in housing policies
 - The HOTMA/packet has all new information; how earned income is calculated, how assets are calculated, medical, childcare... the process is different. For example, the medical exclusion was 3%, and now is 10%. The Resident(s) / Board is encouraged to read over the new policy and ask questions about anything they don’t understand.
- Reasonable accommodations – *504 policies and procedures have been added in support of persons with disabilities (*introduced **Myrena Thomas** as the 504 Coordinator.) Myrena informed the resident council officers that her office is on the lower level of Golden Tower and encouraged them to reach out to their property managers with Reasonable Accommodations requests. She will review and process all requests.

➤ Tenant Charges

| | | | |
|---------------|---------------------|-----------------|-----------------|
| ◦ Flat Rents: | <u>Golden Tower</u> | <u>Previous</u> | <u>Proposed</u> |
| | Efficiency | \$729 | \$ 827 |
| | 1 Bdm (corner) | \$797 | \$ 901 |
| | 1 Bdm (interior) | \$827 | \$ 931 |

| | | | |
|--|------------------------|---------|---------|
| | <u>Latonia Terrace</u> | | |
| | 1 Bdm | \$ 827 | \$ 931 |
| | 2 Bdm | \$1,076 | \$1,207 |
| | 3 Bdm | \$1,429 | \$1,596 |

| | | | |
|--|----------------------|--------|--------|
| | <u>Academy Flats</u> | | |
| | 1 Bdm (PHA/HCV) | \$ 827 | \$ 931 |

| | | | |
|--|--------------------------|---------|---------|
| | <u>ESR 1, NSP, Emery</u> | | |
| | 1 Bdm | \$ 827 | \$ 931 |
| | 2 Bdm | \$1,076 | \$1,207 |
| | 3 Bdm | \$1,429 | \$1,596 |

- Security Deposits: Security Deposits will be increased to \$700 for non-elderly/nondisabled and \$500 for elderly/disabled. Deposits may be split in two payments; first payment due at lease signing and the second payment due with the next rent payment.
- Maintenance Charges: Labor charges are \$45 per hour and will be billed at a minimum of one hour.

Property Management ~ **Sharon Brown**

- Community Room / Rec Hall reservations: Rentals shall not exceed a 4-hour time limit unless otherwise approved by management. Maximum shall not exceed 128 persons at Golden Tower and 62 persons at Latonia Terrace.
- Pest Control and Extermination: Treatment will not occur if a minor is home alone and unsupervised. There will be a charge for a return visit.
- Curb appeal rules for a clean and safe community:
 - Open and closed sided tents or canopies must be taken down and stored inside the residents' apartments. They are not to be left set up when not in use.
 - Latonia Terrace garbage is picked up on Mondays.
 - Golden Tower garbage chutes are located on each floor along with an outside dumpster container.
 - All other properties, please contact Rumpke for proper pick-up day.
- Resident Parking Policy (Golden Tower): The gated lot at Golden Tower is for properly permitted vehicles. In the event a resident has *more than one vehicle that has a permit (*grandfathered in from old policy), only one vehicle may be parked in the gated lot at any given time.

COMMENTS: Veverly Gibson- *“How do we prevent residents with more than one vehicle from parking in the lot?”* **Sharon Brown-** *“Report it to the manager.”* **Lestelle Turney-** *“Residents park wherever they want; on the sidewalk and in the grass...”* **Chris Bradburn-** *“Is this just residents or guests too?”* **Sharon Brown-** *“Both; the problem is we need to catch them in the act.”* **Jon Adkins-** *“Hopefully, this is where the cameras will work for us going forward.”*

- **Capital Fund Projects / Priorities and Budget ~ Linda DiGirolamo**

- The 5-year Capital Fund Plan for 2025 – 2029 is a budget. The agency may or may not receive the total budgeted amount shown.
 - Golden Tower plans are to clean outside windows, bricks and railings.
 - Latonia Terrace plans are to replace windows (including blinds and screens).

COMMENTS: Veverly Gibson- *“Can we get new windows at Golden Tower?”* **Linda DiGirolamo-** *“Not on this project. We did a survey, and the number of windows that need repair do not equate to the price of replacement at this time.”* **Veverly Gibson-** *“Are we ever going to get new mailboxes?”* **Steve Arlinghaus-** *“We have been working with the USPS for an acceptable plan, and so far they have denied everything. They are enforcing stricter codes that up to this point we can’t meet.”* **Jon Adkins-** *“The window project sounds exciting, right?”* **Lestelle Turney-** *“No. I think new bathrooms and kitchens are more important.”* **Steve Arlinghaus-** *“Renovations at Latonia Terrace are on the horizon. We are working with consultants for information on bathrooms, kitchens, lighting and floors.”* **Linda DiGirolamo-** *“Windows are a priority at this time because they improve insulation for the units and regulate temperatures.”*

- **Other Strategic Initiatives ~ Chris Bradburn**

- The sale of City Heights proceeds will go primarily to cover Latonia Terrace and Golden Tower renovations. We are currently working to resolve boundary issues in City Heights to proceed with the sale.
- The Public Housing / HCV program consolidation is moving forward while we await confirmation approval from HUD, the request for which was submitted in March 2024.
- Emery Drive, ESR11 and ESR111 are moving towards RAD conversion. This means that agency funding will come out of a different funding “bucket,” from the Public Housing Program to the Section 8/ Housing Choice Voucher Program.
- Physical Needs Assessments will be performed on select sites. The PNAs are required by HUD every 5 years and will be performed by a third-party inspector. The goal of the assessments is to help develop and budget for future modernization plans.
- We are in the process of disposition of 1016 Greenup, a vacant commercial property owned by HAC. We no longer have a need for the property. Sales proceeds will be used for future improvements at our residential sites.
- HAC is striving to achieve HUD’s High Performer Status to be eligible for the Moving to Work (MTW) designation. (The designation is based on the PHAS scoring system.) A MTW designation allows PHAs greater operational and funding flexibility across programs and the agency’s physical portfolio.

COMMENTS: Chris Bradburn- *“I know this is a lot to take in; do you have any questions?”* **Veverly Gibson-** *“How do we change programs with RAD you were talking about?”* **Chris Bradburn-** *“Currently, only the residents of Emery Drive, ESR11 and ESR111 are affected; and the only change is that they will sign a new lease.”* **Shannon Wilson-** *“After the conversion, new applicants will apply with Section 8.”*

Chris Bradburn asked if there were any further questions or comments:

There were no further questions or comments.

Jon Adkins asked the Resident Council members to take the information presented to the next Resident Council meeting and discuss it with the attendees.

Chris Bradburn reminded the Resident Council members that there will be a **45-day comment period beginning 2/14/2025 through 3/31/2025** if they wish to remark. The Public Hearing with the Board of Commissioners will be held on 4/16/2025 for Board approval. Then the Plan will be submitted to HUD.

The Resident Council members were thanked for their participation and the meeting was adjourned at 11:11am.