



**INLIVIAN**  
HOUSING REDEFINED

# 2021 MOVING TO WORK ANNUAL PLAN

# INLIVIAN LEADERSHIP

---

## **BOARD OF COMMISSIONERS**

Shirley L. Fulton, Chair

Leigh Ann Merchant, Vice Chair

Linda Ashendorf

Lucy M. Brown

Antoine Dennard

Michael Kennerly

Ray McKinnon

## **PRESIDENT AND CHIEF EXECUTIVE OFFICER**

A. Fulton Meachem, Jr.

## **SENIOR MANAGEMENT**

Cheryl Campbell, Executive Vice President of Real Estate Management

Kimberley Cole, Executive Vice President of Administrative Operations

Tomico Evans, Executive Vice President of Client Services

Heather Franklin, Executive Vice President of Finance

Harriet L. Huell, Executive Vice President of Legal

Sandra Y. Pizarro, Executive Vice President of Talent Operations

Connie Staudinger, Executive Vice President of Real Estate Development

Kenneth Wood, Executive Vice President of Information Technology

# TABLE OF CONTENTS

|                                                               |           |
|---------------------------------------------------------------|-----------|
| <b>I. INTRODUCTION</b>                                        | <b>4</b>  |
| <b>A. OVERVIEW OF SHORT-TERM MTW GOALS &amp; OBJECTIVES</b>   | <b>4</b>  |
| <b>B. OVERVIEW OF LONG-TERM MTW GOALS &amp; OBJECTIVES</b>    | <b>5</b>  |
| <b>II. GENERAL OPERATING INFORMATION</b>                      | <b>7</b>  |
| <b>A. HOUSING STOCK INFORMATION</b>                           | <b>7</b>  |
| <b>B. LEASING INFORMATION</b>                                 | <b>12</b> |
| <b>C. WAITING LIST INFORMATION</b>                            | <b>12</b> |
| <b>III. PROPOSED MTW ACTIVITIES</b>                           | <b>14</b> |
| <b>IV. APPROVED MTW ACTIVITIES</b>                            | <b>15</b> |
| <b>A. IMPLEMENTED ACTIVITIES</b>                              | <b>15</b> |
| <b>B. NOT YET IMPLEMENTED ACTIVITIES</b>                      | <b>23</b> |
| <b>C. ACTIVITIES ON HOLD</b>                                  | <b>24</b> |
| <b>D. CLOSED OUT ACTIVITIES</b>                               | <b>25</b> |
| <b>V. SOURCES AND USES OF FUNDS</b>                           | <b>27</b> |
| <b>A. SOURCES AND USES OF MTW FUNDS</b>                       | <b>27</b> |
| <b>B. LOCAL ASSET MANAGEMENT PLAN</b>                         | <b>29</b> |
| <b>C. RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION</b> | <b>29</b> |
| <b>VI. ADMINISTRATIVE</b>                                     | <b>30</b> |
| <b>VII. APPENDIX</b>                                          | <b>31</b> |

# I. INTRODUCTION

## A. Overview of Short-Term MTW Goals and Objectives

Moving to Work (MTW) is a U.S. Department of Housing and Urban Development (HUD) demonstration program which allows housing authorities to design and test innovative housing and self-sufficiency initiatives targeted to address local needs. The MTW designation allows INLIVIAN to waive certain statutes and HUD regulations in order to increase housing choice for low-income families, encourage households to pursue self-sufficiency, and improve administrative and operational cost effectiveness. As a high-performing, innovative and progressive agency, INLIVIAN received its MTW designation in 2006. In April 2016, the MTW agreement was extended for an additional ten years through 2028. INLIVIAN's MTW designation allows it to test new methods to improve housing services and to better meet the dynamic and everchanging needs of the greater Charlotte-Mecklenburg area.

INLIVIAN's success is informed by forward thinking leadership and an ambitious business approach relating to areas of asset and property management; site development; and, services delivery. INLIVIAN's MTW designation in short allows policies to be implemented which reach beyond traditional forms of housing assistance. This allows program innovations to serve as an onramp for housing stability for families on their path to economic independence. It further supports and advances the neighborhoods served by INLIVIAN. INLIVIAN has branded the local effort Moving Forward, which reflects a combination of shared intent, forward movement and an image of affordable housing that serves as a safety net and platform for rebuilding lives.

In reviewing our MTW plan for fiscal year 2020, it is clear: MTW is an essential part of INLIVIAN's day-to-day operations while it continues to achieve its mission to develop, operate and provide quality housing in sustainable communities of choice for residents of diverse incomes. This next year, INLIVIAN will strive to continue to:

### **COMPLETE RENTAL ASSISTANCE DEMONSTRATION (RAD) CONVERSIONS**

With INLIVIAN's capacity to utilize both MTW flexibilities and RAD program guidelines, a role can be assumed that is more conducive to the competitive private market. Making the move to RAD will continue to enable INLIVIAN to achieve major goals while safeguarding long term affordability of units without further burdening clients with increased rental costs in a challenging local market. INLIVIAN has converted a total of 3,179 Public Housing units to Project Based Voucher (PBV) units and is on schedule to convert 100 percent of the agency's Public Housing inventory by end of FY 2022.

### **UTILIZE QUALITY RESEARCH AND EVALUATION TO DRIVE DECISIONS THAT SHAPE EFFECTIVE, PRACTICAL AGENDAS AND POLICIES**

INLIVIAN looks to further utilize its well-organized data collections and management strategies to produce sound evaluations and impact reports so as to regularly examine MTW policy outcomes to determine if policies: meet the statutory requirements outlined by HUD, and/or can be improved or streamlined. Close partnerships with such great institutions and leaders in their respective fields, allows INLIVIAN to design policies that better correspond to shifting needs of our clients and surrounding market.

## **B. Overview of Long-Term MTW Goals and Objectives**

### **GOAL**

---

#### **Elevate the Customer Experience by Providing a Culture of Service Excellence.**

INLIVIAN has increased capacity to advance a broader range of affordable housing priorities that reach beyond the traditional model of a bricks and sticks Public Housing operation. INLIVIAN will continue to seek efficient outcomes through the high standards of delivery, coupled with the understanding that excellent customer service is a hallmark of a successful agency. Whether by a virtual visit to INLIVIAN's website or various social media platforms, or an in-person visit to INLIVIAN headquarters, INLIVIAN will continue to enhance its customer experience by developing and executing a successful system for gathering and responding to customer feedback. In response to COVID-19, INLIVIAN has enhanced its customer service delivery model with the creation of a Customer Call Center, along with a number of technology enhancements designed to ensure that the agency continues to provide quality customer service even in the midst of a global pandemic.

### **GOAL**

---

#### **Acquire, Develop, and Preserve Diverse Price Point Housing.**

An unfortunate by-product of a strong Charlotte economy has been the extreme pressure on the local housing market. This has had a particularly adverse impact on the lowest income populations. As a result, many are relegated to finding housing outside of the city, becoming isolated in areas where there are less job opportunities, access to amenities and transportation options. Understanding that communities are only as sustainable as our vision for the future, INLIVIAN seeks to provide leadership to further affordable housing in the long-term by preserving or creating at least 850 diverse price point units as outlined in the agency's 2019 Five-year strategic plan, entitled, The Blueprint. MTW flexibility will continue to play a vital role in expanding the supply of permanent mixed-income units in Charlotte by maximizing real estate assets through acquisition, rehabilitation, and development of permanent workforce, market rate, and affordable units in desirable neighborhoods.

### **GOAL**

---

## **Create and Enhance Diverse Income Streams to Support INLIVIAN's Mission.**

INLIVIAN looks to continue its success leveraging real estate assets to maximize value through additional mixed-income and mixed-use development projects. Through a recent organizational transformation and by use of associated instrumentalities, INLIVIAN will utilize vital expertise in development, technology, property management, social service provision, and other areas to generate various lines of business on a fee-for-service basis to other government, non-profit, and for-profit entities. With the successful utilization of RAD and MTW flexibilities, INLIVIAN can continue to foster innovation and evolve from an agency that was bound to complex and firm HUD rules and regulations, to a visionary agency that is able to compete in a competitive market.

### **GOAL**

---

## **Develop and Maintain Meaningful Mutually Beneficial External Partnerships that Further INLIVIAN's Mission.**

This new INLIVIAN structure will allow the organization the versatility it needs to use resources more flexibly and enter into partnerships that are more mutually beneficial. Empowered by MTW, INLIVIAN is uniquely positioned in the Charlotte metro region to strategically engage in cross-sector partnerships with allies in education, health, social services, and workforce development to better ensure the impact of social investments for INLIVIAN clients are maximized. With these coordinated efforts, the multiple barriers which often exist on the road to self-sufficiency can be better addressed.

### **GOAL**

---

## **Implement a Communication Strategy That Educates the Public on The Agency's Transformation and Engages Stakeholders in Advocacy Efforts that Further INLIVIAN's Mission.**

As INLIVIAN no longer functions like a traditional Public Housing authority, effective engagement will entail clarification of common misconceptions surrounding public housing, what an innovative agency can offer a growing community in the 21st century, and how the agency and its clients are an integral part of Charlotte's larger social, economic, and physical fabric. The enhanced communication strategy is meant to reach a more diverse and broader-based public and to more effectually explain the complexity and the standing of the affordable housing problem in Charlotte.

### **GOAL**

---

## **Acquire, Retain and Develop Top Talent.**

As a viable competitor in the talent market, INLIVIAN must focus on rapidly developing its workforce skills and the capabilities of emerging leadership candidates to shape top talent. Our talent management efforts will continue to focus on acquiring, retaining and developing the

necessary talent to achieve our goals. To this end, INLIVIAN would focus on four talent management initiatives: we will recruit a diverse workforce that will meet the needs of the organization; we will provide comprehensive development and engagement programs to help staff and managers attain professional growth and accomplish their goals; we will provide the necessary tools that prepare our staff for internal and external environmental changes; and we will ensure our compensation and performance management processes align staff performance with organizational goals.

## II. GENERAL OPERATING INFORMATION

### A. Housing Stock Information

#### PLANNED NEW PUBLIC HOUSING UNITS

| ASSET MANAGEMENT PROJECT (AMP) NAME AND NUMBER | BEDROOM SIZE |   |   |   |   |    | TOTAL UNITS | POPULATION TYPE* | # of Uniform Federal Accessibility Standards (UFAS) Units |
|------------------------------------------------|--------------|---|---|---|---|----|-------------|------------------|-----------------------------------------------------------|
|                                                | 0/1          | 2 | 3 | 4 | 5 | 6+ |             |                  | Fully Accessible                                          |
| N/A                                            | 0            | 0 | 0 | 0 | 0 | 0  | 0           | N/A              | 0                                                         |
| N/A                                            | 0            | 0 | 0 | 0 | 0 | 0  | 0           | N/A              | 0                                                         |
| N/A                                            | 0            | 0 | 0 | 0 | 0 | 0  | 0           | N/A              | 0                                                         |

**Total Public Housing units to be added in the plan year: 0**

#### PLANNED PUBLIC HOUSING UNITS TO BE REMOVED

| PROPERTY NAME   | NUMBER OF UNITS TO BE REMOVED | EXPLANATION FOR REMOVAL                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dillehay Courts | 136                           | Phase I of Dillehay consisting of 36 units received early demolition approval through RAD with demolition to begin so long as a CAT CHAP is executed. The remaining 100 units will be processed through Section 18 demolition. These units have reached the end of their useful life, are outdated in appearance and functionality and the current floor plans do not allow for modern amenities like central HVAC, washer/dryers, dishwashers, etc. |

|                 |    |                                                                                                      |
|-----------------|----|------------------------------------------------------------------------------------------------------|
| Strawn Cottages | 11 | Will be converted to PBV vouchers through RAD process and TOA will be completed by end of year 2021. |
|-----------------|----|------------------------------------------------------------------------------------------------------|

### Total Public Housing units to be removed in the plan year: 147

This will be the last of the Public Housing Stock in INLIVIAN's inventory converted to other funding platforms.

### PLANNED NEW PROJECT BASED VOUCHERS

Tenant-based vouchers that INLIVIAN anticipates project-basing for the first time during the Plan Year. These include only those in which at least an Agreement to enter into a Housing Assistance Payment (AHAP) will be in place by the end of the Plan Year.

| PROPERTY NAME           | NUMBER OF VOUCHERS TO BE PROJECT-BASED | RAD? (Yes/No) | DESCRIPTION OF PROJECT                                                                                                                                                                                                                                                                                |
|-------------------------|----------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dillehay Courts         | 36                                     | Yes           | 36 units will be converted to PBV vouchers through RAD and will go through a transfer of assistance to other properties currently being developed with private partners. 100 units will be converted to be tenant-based TPV vouchers through the Section 18 process by end of year 2021.              |
| Strawn Cottages         | 11                                     | Yes           | Remaining units will be converted to PBV vouchers through RAD process and TOA will be completed by end of year 2021.                                                                                                                                                                                  |
| Archdale Flats*         | 36                                     | Yes           | Archdale Flats is a family property that is part of our public private partnership (P3) program. HDP is the General Partner on this transaction. We intend to add subsidy to the 36 30% AMI units by using RAD TOA from previously public housing sites so they can be utilized for redevelopment.    |
| Archdale Seniors*       | 7                                      | Yes           | Archdale Seniors is a Senior property that is part of our P3 program. HDP is the General Partner on this transaction. We intend to add subsidy to the 7 30% AMI units by using RAD TOA from previously public housing sites so they can be utilized for redevelopment.                                |
| Abbingtion on Mt Holly* | 26                                     | Yes           | Abbingtion on Mt Holly is a family property consisting of 102 units that is part of our P3 program. HDP is the Managing Member on this transaction. We intend to add subsidy to the 26 30% AMI units by using RAD TOA from previously public housing sites so they can be utilized for redevelopment. |
| Freedom Flats*          | 11                                     | Yes           | Freedom Flats is a family property consisting of 220 units that is part of our P3 program. HDP is the General Partner on this transaction. We intend to add subsidy to the 11 30% AMI units by using RAD                                                                                              |



|                           |    |     |                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------|----|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           |    |     | TOA from previously public housing sites so they can be utilized for redevelopment.                                                                                                                                                                                                                                                                                                                                                          |
| Ashley Flats              | 8  | Yes | Ashley Flats is a family property consisting of 150 units that is part of our P3 program. HDP is the General Partner on this transaction. We intend to add subsidy to the 8 30% AMI units by using RAD TOA from previously public housing sites so they can be utilized for redevelopment.                                                                                                                                                   |
| Evoke Living at Arrowood* | 8  | Yes | Evoke living at Arrowood is a family property that is part of our P3 program. HDP is the Managing Member on this transaction. We intend to add subsidy to the 8 30% AMI units by using RAD TOA from previously public housing sites so they can be utilized for redevelopment.                                                                                                                                                               |
| Eastway Park              | 40 | No  | INLIVIAN has received HUD approval to convert 40 of the agency's Veteran Affairs Supportive Housing (VASH) voucher allocation to project-based vouchers for 40- units for Veterans in a 132 unit project targeting households that are 55+ years of age. Eastway Park was previously awarded Housing Trust Fund monies and subsequently approached INLIVIAN for needed subsidy to ensure affordability. *VA support to convert VASH to PBVs. |
| Scaleybark*               | 7  | No  | PBV award pending as part of a 2019 joint Request for Proposal (RFP) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) via a Memorandum of Understanding (MOU).                                                                                                                                                                                                                                                |
| 7 <sup>th</sup> Street*   | 20 | No  | PBV award pending as part of a 2019 joint Request for Proposal (RFP) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) via MOU.                                                                                                                                                                                                                                                                                |
| Johnston Oehler Senior*   | 7  | No  | PBV award pending as part of a 2020 joint Request for Proposal (RFP) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) via a MOU.                                                                                                                                                                                                                                                                              |
| Brookhill*                | 60 | No  | PBV award pending as part of a 2020 joint Request for Proposal (RFP) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) via MOU.                                                                                                                                                                                                                                                                                |

### Planned Total Vouchers to be newly Project Based: 277

As part of INLIVIAN's efforts to maximize the agency's MTW authority to meet local housing needs, in 2019 the agency entered into a Memorandum of Understanding (MOU) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) to increase the supply of affordable housing by way of project based voucher subsidies. INLIVIAN anticipates entering into Housing Assistance Payment (HAP) Agreements with development projects selected as part of a local Request for Proposal (RFP) process in conjunction with the MOU. Under the MOU, INLIVIAN sets aside funding for project-based vouchers annually as part of the agency's existing HUD approved Community Based Rental Assistance (CBRA) policy. Awards are made as part of the selection approach outlined

in the CBRA policy (see the CBRA Section in the Appendix for a description). The award of the PBVs will be contingent upon projects meeting HUD requirements, including but not limited to, Environmental Review and Subsidy Layering approvals.

\*\* For description of the agency's P3 Program, please see Appendix F.

### PLANNED EXISTING PROJECT BASED VOUCHERS

| PROPERTY NAME             | NUMBER OF VOUCHERS TO BE PROJECT-BASED | RAD?    | DESCRIPTION OF PROJECT  |
|---------------------------|----------------------------------------|---------|-------------------------|
| 940 Brevard               | 100                                    | yes,40  | Senior                  |
| Arbor Glen 50             | 25                                     | yes,25  | Family                  |
| Arbor Glen I              | 60                                     | yes,60  | Senior, Family          |
| Arbor Glen II             | 40                                     | yes,40  | Family                  |
| Arbor Glen III            | 12                                     | yes,12  | Family                  |
| Ashley Square @ SouthPark | 36                                     | yes,22  | Family/Mixed Income     |
| Autumn Place              | 68                                     | yes,68  | Senior                  |
| Cedar Knoll               | 49                                     | yes,49  | Family                  |
| Charlottetown Terrace     | 161                                    | yes,161 | Disabled                |
| Cherry Gardens            | 11                                     | No      | Senior                  |
| Claremont                 | 50                                     | yes,50  | Family                  |
| Dillehay (Phase 1)        | 36                                     | yes, 36 | Family                  |
| Edwin Towers              | 176                                    | yes,176 | Senior                  |
| Everett House             | 10                                     | No      | Disabled/Supportive     |
| Fairmarket Square         | 16                                     | yes,16  | Family/Mixed Income     |
| First Ward                | 132                                    | yes,132 | Family/Mixed Income     |
| Gladedale                 | 49                                     | yes,49  | Family                  |
| Glen Cove                 | 10                                     | yes,10  | Mixed Income            |
| Hampton Creste            | 60                                     | yes,60  | Mixed Income/Supportive |
| Landing at Park Road      | 92                                     | No      | Senior                  |
| Leafcrest                 | 48                                     | yes,48  | Family                  |
| Mallard Ridge             | 35                                     | yes,35  | Family                  |
| McAden Park               | 60                                     | yes,30  | Family, Mixed Income    |
| McAlpine Terrace          | 26                                     | yes,26  | Senior/Mixed Income     |
| McCreesh Place            | 88                                     | yes,63  | Supportive              |
| McMullen Woods            | 21                                     | yes,21  | Family/Mixed Income     |
| Meadow Oaks               | 32                                     | yes,32  | Family                  |
| Mill Pond                 | 52                                     | No      | Mixed Income            |
| Montgomery Gardens        | 20                                     | yes,20  | Family/Mixed Income     |

|                                |     |         |                                |
|--------------------------------|-----|---------|--------------------------------|
| Moore Place I & II             | 120 | yes,34  | Family/Mixed Income/Supportive |
| Nia Point                      | 29  | yes,29  | Family/Mixed Income            |
| Oaks at Cherry                 | 81  | yes,81  | Family                         |
| Park at Oaklawn                | 89  | yes,89  | Family/Mixed Income            |
| Parktown Terrace               | 163 | yes,163 | Family/Mixed Income            |
| Prosperity Creek               | 156 | yes,156 | Senior                         |
| Residences at Renaissance I    | 31  | yes,31  | Family/Mixed Income            |
| Residences at Renaissance II   | 67  | 67      | Family/Mixed Income            |
| Retreat at Renaissance         | 90  | yes,90  | Senior                         |
| Robinsdale                     | 30  | yes,30  | Family/Mixed Income            |
| Savanna Woods                  | 49  | yes,49  | Family                         |
| Seigle Point                   | 120 | yes,102 | Family/Mixed Income            |
| Seneca Woods                   | 17  | yes,17  | Family/Mixed Income            |
| South Oak Crossing             | 20  | yes,20  | Family/Mixed Income            |
| Southside Homes                | 392 | yes,392 | Family/Mixed Income            |
| Springcroft @ Ashley Park (SR) | 36  | yes,18  | Senior                         |
| Springfield Gardens            | 22  | yes,22  | Senior                         |
| Steele Creek Seniors           | 120 | yes,120 | Senior/Mixed Income            |
| Stonehaven East                | 24  | yes,24  | Family                         |
| Strawn Tower                   | 170 | yes,170 | Senior                         |
| Sunridge                       | 44  | yes,44  | Family                         |
| Tarlton Hills                  | 50  | yes,50  | Family/Mixed Income            |
| Victoria Square                | 31  | yes,31  | Family                         |
| Wallace Woods                  | 48  | yes,48  | Family                         |
| Woodlawn House                 | 104 | yes,104 | Senior                         |
| YWCA Families Together         | 11  | No      | Supportive/Family              |

**Planned Existing Project Based Vouchers: 3,689**

### **PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED DURING THE PLAN YEAR**

Planned other changes to MTW housing stock anticipated during the plan year: 0

### **GENERAL DESCRIPTION OF ACTUAL CAPITAL FUND EXPENDITURES DURING PLAN YEAR 2021**

Dillehay Courts remains the sole Public Housing site operating under the Capital Fund Programs. Plans are currently underway to redevelop Dillehay Courts in multiple phases.

All other sites have been converted to RAD and utilize Reserves for maintenance. With respect to these sites, a draft plan for capital improvements in the 2021 fiscal year per the Physical Conditions Needs Assessment (“PCNA”) is in the preliminary stage and has not been approved by the INLIVIAN Board. Improvements totaling just over \$2.0 Million are expected. Efforts are being made to finalize the scopes of work for some of the sites listed below:

- 940 Brevard – replace common area HVAC units
- Arbor Glen 50 – Replace water heaters
- Arbor Glen I – Replace bathroom tub/shower surround, bathroom vanities, & accessories
- Meadow Oaks – Replace refrigerators
- Montgomery Gardens – Replace HVAC units
- Victoria Square – Replace water heaters, interior doors
- Woodlawn House – Replace tub/shower diverters, louvers for HVAC doors, common area paint, exterior drainage, bi-fold doors, etc.

If newly anticipated MTW Plan (FY 2020) Amendment is successfully approved, INLIVIAN will also proceed with the substantial renovations at the below sites in 2021:

- Autumn Place
- Fairmarket Square
- Sunridge Apartments
- Grove Place
- Oak Valley
- Valley View
- McAlpine Terrace
- Seneca Woods

## B. Leasing Information

| PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH:      | PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED** |
|---------------------------------------------------|------------------------------------------------|---------------------------------------------|
| <b>MTW Public Housing Units Leased</b>            | 0                                              | 0                                           |
| <b>MTW Housing Choice Vouchers (HCV) Utilized</b> | 90,588                                         | 7,549                                       |
| <b>Local, Non-Traditional: Tenant-Based</b>       | 1,740                                          | 145                                         |
| <b>Local, Non-Traditional: Property-Based</b>     | 10,740                                         | 895                                         |
| <b>Local, Non-Traditional: Homeownership</b>      | 144                                            | 12                                          |

**PLANNED TOTAL HOUSEHOLDS SERVED:**

**103,212**

**8.601**

| LOCAL, NON-TRADITIONAL CATEGORY | MTW ACTIVITY NAME/NUMBER                                  | PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED* | PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED* |
|---------------------------------|-----------------------------------------------------------|------------------------------------------------|--------------------------------------------|
| Tenant-Based                    | Rent Reform (2010-1);<br>Triennial reexamination (2016-2) | 1,740                                          | 145                                        |
| Property-Based                  | NA                                                        | 10,740                                         | 895                                        |
| Homeownership                   | Homeownership (2016-1)                                    | 144                                            | 12                                         |

PLANNED LOCAL, NON-TRADITIONAL HOUSEHOLDS SERVED:

**12,624**

**1,052**

## ANTICIPATED ISSUES/POSSIBLE SOLUTIONS RELATED TO LEASING

Nothing pertinent to the issue of leasing to note for plan year 2021.

## C. Waiting List Information

### WAITING LIST INFORMATION ANTICIPATED

| WAITING LIST NAME | DESCRIPTION      | NUMBER OF HOUSEHOLDS ON WAITING LIST | WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED |
|-------------------|------------------|--------------------------------------|---------------------------------------------|
| HCV               | Type: Central    | 5,820                                | (May Partially) Open                        |
| RAD & PBV         | Type: Site Based | 4,432                                | Open                                        |

All applicants can choose to be placed on several site-based waiting lists at the same time. This allows for increased housing choices applicants. When an applicant is housed, they are removed from all other site-based waiting lists managed by INLIVIAN. The INLIVIAN HCV waiting list may open in 2021 to allow current Dillehay residents an opportunity to apply prior to receiving tenant protection vouchers.

### PLANNED CHANGES TO WAITING LIST IN THE PLAN YEAR

| WAITING LIST NAME          | DESCRIPTION OF PLANNED CHANGES TO WAITING LIST                                                                                                                                   |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HCV                        | May partially open to accommodate current Dillehay residents.                                                                                                                    |
| RAD and PBV                | No planned changes                                                                                                                                                               |
| Federal MTW Public Housing | All Public Housing units are to be transitioned to RAD PBV platform, or disposed through HUD section 18 program, therefore there is no associated waiting list planned for 2021. |

\* The rest of this page is intentionally left blank.

## III. PROPOSED MTW ACTIVITIES

INLIVIAN is not proposing any new activities. \*The rest of this page is intentionally left blank.

DRAFT

## IV. APPROVED MTW ACTIVITIES

### A. Implemented Activities

| IMPLEMENTED ACTIVITIES                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                  |                     |                                 |                                            |                             |
|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|---------------------|---------------------------------|--------------------------------------------|-----------------------------|
| Activity                                                               | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Plan Year        | Implementation Date | Planned Non-Significant Changes | Planned Changes to Metrics/Data Collection | Planned Significant Changes |
| 2020-1<br>(Replacing 2018-2, 2017-1)<br>Modified Terms of Over-Subsidy | Significantly amending this activity was designed to expand housing choice. Adjustments to this activity are meant to expand existing flexibility to allow new residents moving into RAD PBV communities with tenant portions of rent that are equal to or exceed the contract rent where the contract rent is lower than the payment standard. Once housed these families will be exempt from the 180-day over-subsidy requirement until the household income reaches 80% of AMI. This revised over-subsidy rule was implemented effective September 2020. | 2017, 2018, 2020 | September, 2020     | NA                              | N/A                                        | N/A                         |
| 2019-1<br>Housing Choice Provider Incentive Program                    | This program will operate based upon the availability of funding so as to recruit and retain landlords by providing increased housing choices for INLIVIAN's Housing Choice applicant and participant families. A range of incentives such as, but not limited to the following will be introduced through the proposed program. Landlord Incentive Payment; Vacancy Assistant Payment; and Risk Mitigation Funds.                                                                                                                                          | 2019             | September, 2019     | N/A                             | N/A                                        | N/A                         |
| 2018-1 Self Certification of reinspection for HQS initials             | The activity allows a self-certification in lieu of a re-inspection when an initial inspection fails, and there are 10 or less different types of non-life-threatening deficiencies. Photos and invoices are required and must be submitted within 30 days of the failed report. A self-certification of completion executed by the participant and the housing provider is also required prior to executing a Housing Assistance Payment (HAP) contract.                                                                                                   | 2018             | June, 2018          | N/A                             | N/A                                        | N/A                         |

| IMPLEMENTED ACTIVITIES                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |           |                     |                                                                                                                                                         |                                            |                             |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|-----------------------------|
| Activity                                    | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Plan Year | Implementation Date | Planned Non-Significant Changes                                                                                                                         | Planned Changes to Metrics/Data Collection | Planned Significant Changes |
| 2017-2<br>Imputed<br>Earned<br>Income       | In both the traditional and Project-Based voucher programs, INLIVIAN does not process interims three months prior to a recertification, three months after a recertification or within three months after a lease up, when there is a loss of income (except in cases of unintentional employment termination) for work abled households. The activity was implemented for the April 2018 re-certifications and March 2018 transfer lease ups. This initiative assists in increasing agency cost effectiveness and promoting self-sufficiency. | 2017      | March-April 2018    | N/A                                                                                                                                                     | N/A                                        | N/A                         |
| 2017-3<br>Exception<br>Payment<br>Standards | To assist families in deconcentrating poverty through upward mobility, INLIVIAN has developed a Choice Mobility program called Opportunity Housing Program. Increasing payment standards for families in the program will increase housing options and expand opportunities for Housing Choice Voucher participants.                                                                                                                                                                                                                           | 2017      | February, 2017      | N/A                                                                                                                                                     | N/A                                        | N/A                         |
| 2016-1<br>Home<br>Ownership<br>Initiative   | INLIVIAN received approval to implement a Homeownership Program in the FY 2016 Annual Plan for qualifying Housing Choice Voucher participants and RAD-PBV participants who are eligible as a first-time home buyer, as defined by HUD, and have earned income, Social Security (SS), or Supplemental Security income (SSI).                                                                                                                                                                                                                    | 2016      | January, 2016       | In 2021, the Destination Homeownership Program will increase the capacity of staff with a Program Coordinator and two (2) certified housing counselors. | N/A                                        | N/A                         |



| IMPLEMENTED ACTIVITIES                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |               |                     |                                 |                                                                                                                                                                                                                                  |                             |
|--------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------------|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| Activity                                               | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Plan Year     | Implementation Date | Planned Non-Significant Changes | Planned Changes to Metrics/Data Collection                                                                                                                                                                                       | Planned Significant Changes |
| 2016-2<br>Triennial Re-examinations                    | In 2018, INLIVIAN implemented triennial re-examinations for designated elderly and/or disabled households for the Housing Choice Voucher (HCV) and Public Housing programs. In response to the conditions created by the coronavirus (COVID-19) that impede the processing of biennial re-examinations during FY2020, INLIVIAN was granted an expansion of triennial recertifications for every head of household. Based on the expected efficiencies that will be created, INLIVIAN looks to continue the implementation across its entire subsidy portfolio, not just those recertifications due in FY2020.                                                                                                                                                                                                         | 2016          | October, 2018       | N/A                             | Due to COVID-19, we do not anticipate a decrease in annual recertifications for 2021. Annual recertifications not completed in 2020, will be completed in 2021 increasing the number of recertifications from the baseline year. | N/A                         |
| 2016-3<br>(2010-1)<br>Rent Reform and Work Requirement | <b>Rent Reform:</b> In 2010, INLIVIAN revised the rent calculation to an income-based, stepped rent process. In 2018, INLIVIAN removed the escrow deposit and replaced it with two new incentive programs. Alternate Verification Activity, as approved via COVID-19 related technical amendment, the alternative verification feature to the agency's rent reform activity was applied upon HUD approval in May 2020. <b>Work Requirement:</b> In 2021, INLIVIAN plans to continue the enforcement of sanctioned phases program wide, as the work requirement applies to all programs. CORE, the supportive services department of INLIVIAN, has increased the capacity of staff to provide coordinated case management services and oversee the continued facilitation of the work requirement policy, as outlined. | 2011,<br>2016 | 2011                | N/A                             | Metrics specific to technical amendment have been incorporated to MTW tracking metrics and will be reflected via the FY 2021 MTW Report.                                                                                         | N/A                         |

| IMPLEMENTED ACTIVITIES                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |           |                     |                                 |                                            |                             |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|---------------------------------|--------------------------------------------|-----------------------------|
| Activity                                  | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Plan Year | Implementation Date | Planned Non-Significant Changes | Planned Changes to Metrics/Data Collection | Planned Significant Changes |
| 2016-4<br>Single Platform for Inspections | INLIVIAN may use the Uniform Physical Condition Standard (UPCS) as the model for inspection in lieu of Housing Quality Standards (HQS) and exclude the UPCS inspection criteria that impacts the building systems, site common areas site amenities. Also, through this activity, the agency's certified/trained UPCS inspector or HCV certified designees as described in the HCV Administrative Plan may conduct inspection of the units for which the agency and/or their subsidiaries have an ownership interest. This activity is designed to improve cost effectiveness through agency costs and staff time savings. Utilization of UPCS inspection criteria for INLIVIAN's tenant-based voucher program has not been implemented. | 2016      | January, 2016       | N/A                             | N/A                                        | N/A                         |
| 2016-5<br>Controlled Program Moves        | INLIVIAN will approve elective move transfers only if the participant has lived in the current unit for a minimum of eighteen (18) consecutive months unless the situation involves a mandatory or permissible move. Documentation examples include a job offer, school letter, police report, bank notices, or any documentation that verifies the legitimacy of the reason for the request to move inside of the 24- month period. This activity applies to all tenant-based voucher holders and port-ins.                                                                                                                                                                                                                             | 2016      | February, 2016      | N/A                             | N/A                                        | N/A                         |

| IMPLEMENTED ACTIVITIES                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |           |                     |                                                                                 |                                            |                             |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|---------------------------------------------------------------------------------|--------------------------------------------|-----------------------------|
| Activity                                    | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                        | Plan Year | Implementation Date | Planned Non-Significant Changes                                                 | Planned Changes to Metrics/Data Collection | Planned Significant Changes |
| 2016-6 Modified Definition of Elderly       | The definition of elderly families for eligibility in both the Public Housing and Project Based Voucher Programs has been modified from head, co- head or spouse age 62 and older, to head, or co-head or spouse age 55 and older. This activity enables INLIVIAN to expand housing choice for near elderly households.                                                                                                                                   | 2016      | January, 2016       | N/A                                                                             | N/A                                        | N/A                         |
| 2011-3 New Construction of Affordable Units | Funding flexibility granted via this approved activity allows INLIVIAN to improve 100% low-income properties into mixed-income communities. The projects will include units intended for a wider range of income levels, from market rate to units that are affordable to those earning less than 30% area median income (AMI). Adding these units will increase housing choices for those needing affordable housing in viable and sustainable projects. | 2011      | January, 2011       | Applicable Communities for FY 2021: Baxter street; Tall Oaks; Dillehay; Strawn. | N/A                                        | N/A                         |

| IMPLEMENTED ACTIVITIES                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |           |                     |                                 |                                            |                             |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|---------------------------------|--------------------------------------------|-----------------------------|
| Activity                                           | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Plan Year | Implementation Date | Planned Non-Significant Changes | Planned Changes to Metrics/Data Collection | Planned Significant Changes |
| 2009-3<br>Community Based Rental Assistance (CBRA) | <p>This program encompasses Traditional Project-Based voucher, Special Needs units (elderly, disabled, supportive service and homeless) and Local Rental Subsidy programs for implementation of Community Based Rental Assistance (CBRA). The CBRA policy is also applicable to units converted to PBV under the Rental Assistance Demonstration (RAD) program. Specific policy regarding the CBRA program is further explained in the Appendix of this document. As part of INLIVIAN’s efforts to maximize the agency’s MTW authority to meet local housing needs, in 2019 the agency entered into a Memorandum of Understanding (MOU) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) to increase the supply of affordable housing by way of project based voucher subsidies. INLIVIAN anticipates entering into Agreements to enter into Housing Assistance Payment (AHAP) with development projects selected as part of a local Request for Proposal (RFP) process in conjunction with the MOU. Under the MOU, INLIVIAN sets aside funding for project-based vouchers annually as part of the agency’s existing HUD approved Community Based Rental Assistance (CBRA) policy. Awards are made as part of the “Joint Proposals with the City and State” selection approach outlined in the CBRA policy (see the CBRA Section in the Appendix for a description). The award of the PBVs will be contingent upon projects meeting HUD requirements, including but not limited to, Environmental Review and Subsidy Layering approval.</p> | 2009      | January, 2009       | N/A                             | N/A                                        | N/A                         |

| IMPLEMENTED ACTIVITIES                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                    |           |                     |                                 |                                                                                                        |                             |
|-----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|---------------------------------|--------------------------------------------------------------------------------------------------------|-----------------------------|
| Activity                                                        | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                 | Plan Year | Implementation Date | Planned Non-Significant Changes | Planned Changes to Metrics/Data Collection                                                             | Planned Significant Changes |
| 2009-5 Moving Forward Supportive Services                       | As of January 2018, Supportive Services are now provided to the entire INLIVIAN portfolio in conjunction with the agency-wide implementation of the Work Requirement Policy.                                                                                                                                                                                                                                                       | 2009      | January, 2009       | N/A                             | N/A                                                                                                    | N/A                         |
| 2009-8 Land Acquisition for Future Use                          | MTW flexibility allows INLIVIAN to acquire sites without prior HUD approval, if the agency certifies that HUD site selection requirements have been met. This allows INLIVIAN to be nimble and competitive in the market when opportunities become available. With INLIVIAN's plan to increase the number of affordable housing opportunities, acquiring land is an option to be considered.                                       | 2009      | January, 2009       | N/A                             | The expected amount of funds leveraged after this activity is \$32,113,015; Benchmark metric adjusted. | N/A                         |
| 2008-3 Investment Policies Consistent with State Law Initiative | INLIVIAN invests only in securities authorized under NC state law that allow the flexibility to invest productively and efficiently to achieve a portfolio which is safer, more liquid, and obtains competitive yield. CHA's investments are performed in accordance with HUD regulations and North Carolina Statutes. This activity has allowed CHA to achieve higher earnings on idle funds in a safer, more liquid environment. | 2009      | January, 2009       | N/A                             | N/A                                                                                                    | N/A                         |

| IMPLEMENTED ACTIVITIES                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |           |                     |                                 |                                            |                             |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|---------------------------------|--------------------------------------------|-----------------------------|
| Activity                                                             | Description/Update                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Plan Year | Implementation Date | Planned Non-Significant Changes | Planned Changes to Metrics/Data Collection | Planned Significant Changes |
| 2008-7 Increase Acquisition and Rehabilitation of Multi-family Units | <p>INLIVIAN is anticipating the purchase of expiring tax credit and market rate units. First Ward Place, INLIVIAN's first Hope VI, is presenting itself as an opportunity to be recapitalized at the end of its compliance period. The two-phase project contains 283 total units that include a mix of RAD/tax credit, tax credit and unrestricted market units. The market units are Naturally Occurring Affordable Housing (NOAH) due to their age and condition. The property is in a high opportunity area and preservation of income restricted units is a high priority. In January 2020, INLIVIAN purchased all member interests and is the sole member of this project at this time. With site control in hand, HDP will submit a 9% Tax Credit Application to NCHFA in 2021 to recapitalize Phase I.</p> | 2008-2009 | January, 2009       | N/A                             | N/A                                        | N/A                         |

## B. Not Yet Implemented Activities

All active initiatives plan to be implemented in FY 2021 except for those explicated in the “Activities on Hold” Section, below. \* The rest of this page is intentionally left blank.

DRAFT

## C. Activities on Hold

| ACTIVITIES ON HOLD                       |                                                                                                                                                                                                                       |           |                     |                                         |                                                                                                                                                                                                                                                                                                            |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity                                 | Description/Update                                                                                                                                                                                                    | Plan Year | Implementation Date | Plan Year Activity was Placed on "Hold" | Reason Activity was Placed "on hold"                                                                                                                                                                                                                                                                       |
| 2008-2 Participant and Landlord Tracking | Through this activity, the agency began tracking the locations of Housing Choice Vouchers to best inform data-driven results, aimed at increasing access to affordable housing prospects in higher opportunity areas. | 2008-2009 | January, 2008       | 2019                                    | The Participant Landlord Tracking initiative provided insight for current policy undertakings and to inform the Exception Payment Standards Initiative which was implemented in the first quarter of the FY 2017. To avoid duplicative policies, this initiative was put on hold beginning plan-year 2019. |
| 2013-2 Biennial Agency-Wide Inspections  | INLIVIAN began the first biennial inspections in November 2015 for all properties and units.                                                                                                                          | 2013      | November, 2015      | 2019                                    | This activity is no longer applicable to MTW planning as HUD currently permits all housing authorities to conduct biennial inspections. However, INLIVIAN does not want to lose the flexibility in the long-term, in case, HUD should reverse broad approval of general policy.                            |



## D. Closed Out Activities

| CLOSED OUT ACTIVITIES                                                                  |                                                                                                                                                                                                                                                           |           |                     |                                     |                                                                                                                                                                                                          |
|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity                                                                               | Description/Update                                                                                                                                                                                                                                        | Plan Year | Implementation Date | Plan Year Activity was "Closed Out" | Reason Activity was "Closed Out"                                                                                                                                                                         |
| 2015-1 Streamline Project-Based Voucher and Public Housing Regulations                 | This activity was pursued to streamline regulations of Project-Based (PBV) and Public Housing units in developments that house both.                                                                                                                      | 2015      | January, 2015       | 2019                                | INLIVIAN no longer has properties with PBV and PH in the same development after RAD conversion.                                                                                                          |
| 2015-2 Public Housing No Assistance Termination Policy (Mixed Income Communities Only) | This activity was pursued to allow terminations to Public Housing assistance for households no longer using the subsidy in mixed- income communities.                                                                                                     | 2015      | January, 2015       | 2017                                | This activity has been combined with 2017-1-Modified Terms of Over Subsidy. This activity was closed-out effective fiscal year end 2016 (following HUD approval of the FY 2017 Plan and RAD Conversion). |
| 2011-1 Acquisition of General Partnership Interest                                     | This activity allowed the agency to acquire the General Partnership interest in the Little Rock Apartments.                                                                                                                                               | 2011      | January, 2011       | 2016                                | Acquisition of property completed.                                                                                                                                                                       |
| 2011-2 Local Non-Traditional Initiatives                                               | The activity allowed for supportive services partnerships.                                                                                                                                                                                                | 2011      | January, 2011       | 2018                                | The Supportive Housing Innovative Partnership (SHIP) units will now be considered Supportive Housing units under our Community Based Rental Assistance Policy.                                           |
| 2009-6 Youth Initiatives                                                               | This activity established a Cooperative Agreement to Form Partnerships with local education stakeholders to connect INLIVIAN participants to programs and services that address truancy, post- secondary education preparation, and academic improvement. | 2009      | January, 2009       | 2015                                | The Agreement has expired.                                                                                                                                                                               |

| CLOSED OUT ACTIVITIES                                   |                                                                                                                                                                                                                                                                        |           |                     |                                     |                                                                                                    |
|---------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------|-------------------------------------|----------------------------------------------------------------------------------------------------|
| Activity                                                | Description/Update                                                                                                                                                                                                                                                     | Plan Year | Implementation Date | Plan Year Activity was "Closed Out" | Reason Activity was "Closed Out"                                                                   |
| 2008-2 Biennial Review Process for Elderly and Disabled | This activity allowed INLIVIAN to implement a biennial review process for elderly and disabled heads of households.                                                                                                                                                    | 2009      | January, 2010       | 2013                                | INLIVIAN subsequently implemented an agency-wide biennial process.                                 |
| 2008-5 Good Neighbor Training                           | The training was designed to assist families' acclimation to a neighborhood. Participants accessed training to learn more about being "Good Neighbors".                                                                                                                | 2008      | January, 2008       | 2014                                | The trainings have been incorporated into initial briefing sessions for all head of households.    |
| 2008-2009 Development of Local Design Standards         | This activity allowed for INLIVIAN to streamline design standards.                                                                                                                                                                                                     | 2009      | January, 2011       | 2014                                | MTW flexibility is no longer necessary.                                                            |
| 2007-2 Affordable Housing Impact Study                  | This activity allowed for a partnership with 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 communities.         | 2007      | January, 2008       | 2010                                | The study was completed, and findings have been initiated through other INLIVIAN programs.         |
| 2007-2008 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 to encourage an increase in the percentage of high-quality Section 8 rental units. | 2008      | January, 2009       | 2011                                | The activity was discontinued due to costs versus the overall impact upon housing choice families. |

# V. SOURCES AND USES OF FUNDS

## A. Sources and Uses of MTW Funds

### ESTIMATED SOURCES AND USES OF MTW FUNDING FOR THE FISCAL YEAR

| <u>FDS Line Item</u>                  | <u>Sources</u><br><u>FDS Line Item Name</u> | <u>Dollar Amount</u> |
|---------------------------------------|---------------------------------------------|----------------------|
| 70500 (70300+70400)                   | Total Tenant Revenue                        | \$295,788            |
| 70600                                 | HUD PHA Operating Grants                    | \$106,175,140        |
| 70610                                 | Capital Grants                              | \$3,121,960          |
| 70700 (70710+70720+70730+70740+70750) | Total Fee Revenue                           | \$0                  |
| 71100+72000                           | Interest Income                             | \$50,000             |
| 71600                                 | Gain or Loss on Sale of Capital Assets      | \$0                  |
| 71200+71300+71310+71400+71500         | Other Income                                | \$11,998,941         |
| 70000                                 | Total Revenue                               | \$121,641,829        |

### ESTIMATED SOURCES AND USES AND AMOUNTS OF MTW SPENDING BY FDS LINE ITEM

| <u>FDS Line Item</u>                                       | <u>USES</u><br><u>FDS Line Item Name</u>     | <u>Dollar Amount</u> |
|------------------------------------------------------------|----------------------------------------------|----------------------|
| 91000<br>(91100+91200+91400+91500+91600+91700+91800+91900) | Total Operating - Administrative             | \$7,614,341          |
| 91300+91310+92000                                          | Management Fee Expense                       | \$2,421,254          |
| 91810                                                      | Allocated Overhead                           | \$0                  |
| 92500 (92100+92200+92300+92400)                            | Total Tenant Services                        | \$104,506            |
| 93000<br>(93100+93600+93200+93300+93400+93800)             | Total Utilities                              | \$389,568            |
| 93500+93700                                                | Labor                                        | \$0                  |
| 94000 (94100+94200+94300+94500)                            | Total Ordinary Maintenance                   | \$1,188,429          |
| 95000 (95100+95200+95300+95500)                            | Total Protective Services                    | \$632,867            |
| 96100 (96110+96120+96130+96140)                            | Total insurance Premiums                     | \$115,216            |
| 96000<br>(96200+96210+96300+96400+96500+96600+96800)       | Total Other General Expenses                 | \$20,000             |
| 96700 (96710+96720+96730)                                  | Total Interest Expense and Amortization Cost | \$0                  |
| 97100+97200                                                | Total Extraordinary Maintenance              | \$0                  |

|                         |                                                             |                      |
|-------------------------|-------------------------------------------------------------|----------------------|
| 97300+97350             | Housing Assistance Payments + HAP<br>Portability-In<br>USES | \$73,805,978         |
| <u>FDS Line Item</u>    | <u>FDS Line Item Name</u>                                   | <u>Dollar Amount</u> |
| 97400                   | Depreciation Expense                                        | \$0                  |
| 97500+97600+97700+97800 | All Other Expenses                                          | \$35,349,670         |
| 90000                   | Total Expenses                                              | \$121,641,829        |

## DESCRIPTION OF PLANNED USE OF MTW SINGLE FUND FLEXIBILITY

INLIVIAN continues to use MTW Single Fund Flexibility to support various housing programs and services as well as invest in development projects to further the agency's mission and strategic goals. The flexibility allows INLIVIAN to balance the funding needs among various programs to achieve higher outcomes that would otherwise be constrained by inadequate resources. Planned uses of MTW Single Fund Flexibility includes supporting the following programs:

### Housing Choice Voucher (HCV) Program

The HCV Program enables low-income families, the elderly and the disabled to afford decent and safe housing in the private market. The HCV Program is a major use of MTW Single Fund Flexibility, which allows the agency to direct funding towards addressing specific local needs, such as increasing greater access to opportunity zones and increasing housing supply via landlord incentives and outreach initiatives.

### C.O.R.E. Programs, Inc. (CORE)

CORE consists of the Client Services Department, which delivers supportive services to residents in gaining the necessary skills for success intended to increase the resident's quality of life. The program goal is to help families become financially stable and decrease their dependence on housing subsidy. Case managers work with families to identify barriers and coordinate resources to address these barriers. MTW Single Fund Flexibility provides for CORE operating activities and special resources such as the following:

#### *With Every Heartbeat is Life (WEHL) Program*

The WEHL Program educates our residents on the importance of cardiovascular disease awareness, making healthy food selections, and the importance of physical activity. The WEHL Program strongly believes in the "each one, teach one" method. This means sharing what you learn with others. This method is used to extend awareness as much as possible to Public Housing Communities to promote better health choices in hopes of developing healthy communities.

#### *MAXimize Your Potential Academic Enhancement Program (MAX)*

The MAX Program is a youth development program that aims to provide the skills needed to prepare high school students for academic success in high school, college and beyond. Over the course of a school year, students participated in stimulating college and career readiness workshops and activities designed to develop intrinsic motivation and the confidence students need to be successful in their post-secondary future. To help improve their academic performance, students

received tutoring via one-on-one and group sessions. Though the program is focused on improving academic success, it also provides inspiration for students to do their very best. The MAX Program empowers students by drawing on their unique talents, strengths, and capabilities. By holding to these standards, the Program strives to reinforce self-motivation and personal responsibility and propel students toward academic excellence.

### **Development Projects**

MTW Single Fund Flexibility is used for development and revitalization projects to increase the supply of diverse price point housing. INLIVIAN maintains its mission to expand quality affordable housing opportunities through these real estate development initiatives, which may include predevelopment, redevelopment, administrative costs related to the capital projects and other investments involving public-private partnerships.

## **B. Local Asset Management Plan**

### **IS INLIVIAN ALLOCATING COSTS WITHIN STATUTE?**

Yes.

### **IS INLIVIAN IMPLEMENTING A LOCAL ASSET MANAGEMENT PLAN (LAMP)?**

No, therefore No LAMP documentation provided in Appendix. INLIVIAN does not plan or intend to make any associated changes during the plan year.

## **C. Rental Assistance Demonstration (RAD) Participation**

### **DESCRIPTION OF RAD PARTICIPATION**

INLIVIAN is close to completing a RAD portfolio conversion with one community remaining in Public Housing; Dillehay Courts. INLIVIAN anticipates converting the operating subsidies of the 136 Dillehay units in 2021/2022. INLIVIAN is converting all of the Public Housing subsidies in Phase I (36 units) to the RAD PBV program and will use the RAD Transfer of Assistance to preserve the 100 remaining affordable units at Dillehay, and at other HDP owned communities.

### **HAS INLIVIAN SUBMITTED A RAD SIGNIFICANT AMENDMENT IN THE APPENDIX?**

Yes.

### **IS THE RAD SIGNIFICANT AMENDMENT SUBMITTED AS APPENDIX. THE FIRST?**

The original RAD Significant Amendment was introduced in the FY 2016 MTW Plan. The most recently approved modification via INLIVIAN's FY 2020 MTW Plan, amended specifics detailing total tenant payments when over subsidy.

## VI. ADMINISTRATIVE

### A. Board Resolution and Certifications of Compliance

Certification of Compliance is included as Appendix A of the Plan. The signed Board Resolution is included in Appendix B of the Plan.

### B. Documentation of Public Process

Documentation of Public Process is listed in Appendix C of the Plan.

### C. Planned and Ongoing Evaluations

Through close partnership with the University of North Carolina (UNC) at Chapel Hill Department of City and Regional Planning, INLIVIAN aims to regularly examine MTW and related policy outcomes to determine if policies: meet the statutory requirements outlined by HUD and/or can be improved or streamlined. UNC will produce a report on FY2020 MTW activity that will be included as part of INLIVIAN's 2020 MTW Report.

### D. Lobbying Disclosures

There are no lobbying activities to disclose. Proper documentation included as Appendix I.

## VII. APPENDIX

- Appendix A: Certification of Compliance
- Appendix B: Board Resolution
- Appendix C: Documentation of Public Process
- Appendix D: Sample Rent Bands by Bedroom Size
- Appendix E: Community Based Rental Assistance (CBRA) Policy
- Appendix F: Planned Additional Agency Activities for FY 2021
- Appendix G: Planned Demolition/Disposition Activity for FY 2021
- Appendix H: Agency update RAD Significant Amendment
- Appendix I: Lobbying Disclosures

## Appendix A

### **SIGNED CERTIFICATE OF COMPLIANCE**

To be included at the end of the public review and comment period.

DRAFT

## Appendix B

### **SIGNED BOARD RESOLUTION**

To be included when the plan is approved for submission to HUD by the Board at the end of the public review and comment period.

DRAFT



## Appendix C

### DOCUMENTATION OF PUBLIC PROCESS

#### MTW PLAN PUBLIC REVIEW PERIOD

*October 16-November 18, 2020.*

#### MEETINGS AND HEARINGS

- ❖ November 5: Plan draft presentation to INLIVIAN Committee on Community Relations (CRC) Meeting.
- ❖ November 3: Plan and process overview to INLIVIAN Resident Advisory Committee.
- ❖ November 17: Public Hearing held virtually, notification of how to participate via public comment of further inquire posted on INLIVIAN website at beginning of public comment on *October 16, 2020.*
- ❖ January 7: INLIVIAN CRC review and approval for Board review.
- ❖ January 19: Board Adoption.

#### PUBLISHING AND POSTING

- ❖ October 14: Notice published in the La Noticia.
- ❖ October 15: Notice published in the Charlotte Post.
- ❖ October 16: Notice published in the Charlotte Observer.
- ❖ October 16: Plan Draft and Public Notice posted on INLIVIAN's website.
- ❖ October 15: Plan made available online and sent to property management staff. Customary public posting of physical document hindered by COVID-19 public building closure guidelines.
- ❖ October 16: Public Notice and access to Plan Draft posted on INLIVIAN social media.
- ❖ November 16-17: Reminder of public hearing and details thereof/access to Plan Draft shared via INLIVIAN social media.

#### INLIVIAN COMMUNITY NOTIFICATION/ENGAGEMENT SESSIONS

The FY 2021 MTW Annual Plan Draft was presented to the Agency's Resident Advisory Council on October 10, 2020 and the Client Relations Committee on November 5, 2020. Notice of public hearing and information on the comment period and directions on how to comment were communicated through social media at the start and ending of the public comment period. The public hearing was hosted by the agency's Board of Commissioners, was conducted via phone and web-based meeting formats. No comment from the public on related amendment items were provided or submitted. Board approval for INLIVIAN's FY 2021 MTW Plan was conducted on January 19, 2021.

## Appendix D

### SAMPLE RENT BANDS BY BEDROOM SIZE

*\*\*There will be variation in maximum contract rents from property to property that have converted to RAD but generally are comparable in amount to ceiling rents. FMR amounts are the most up-to-date (FY 2020).*

| Income Range |          | Total Tenant Payment Amount by Bedroom Size<br>(only applies to public housing) |                        |                         |                         |
|--------------|----------|---------------------------------------------------------------------------------|------------------------|-------------------------|-------------------------|
|              |          | 1 bed<br>(\$897 FMR)                                                            | 2 bed<br>(\$1,028 FMR) | 3 bed<br>(~\$1,388 FMR) | 4 bed<br>(~\$1,779 FMR) |
| \$0          | \$2,499  | \$75                                                                            | \$75                   | \$75                    | \$75                    |
| \$2,500      | \$4,999  | \$75                                                                            | \$75                   | \$75                    | \$75                    |
| \$5,000      | \$7,499  | \$125                                                                           | \$125                  | \$125                   | \$125                   |
| \$7,500      | \$9,999  | \$188                                                                           | \$188                  | \$188                   | \$188                   |
| \$10,000     | \$12,499 | \$250                                                                           | \$250                  | \$250                   | \$250                   |
| \$12,500     | \$14,999 | \$313                                                                           | \$313                  | \$313                   | \$313                   |
| \$15,000     | \$17,499 | \$375                                                                           | \$375                  | \$375                   | \$375                   |
| \$17,500     | \$19,999 | \$438                                                                           | \$438                  | \$438                   | \$438                   |
| \$20,000     | \$24,999 | \$500                                                                           | \$500                  | \$500                   | \$500                   |
| \$25,000     | \$27,499 | \$563                                                                           | \$563                  | \$563                   | \$563                   |
| \$27,500     | \$29,999 | \$625                                                                           | \$625                  | \$625                   | \$625                   |
| \$30,000     | \$32,499 | \$688                                                                           | \$688                  | \$688                   | \$688                   |
| \$32,500     | \$34,999 | \$813                                                                           | \$813*                 | \$813                   | \$813                   |
| \$35,000     | \$37,499 | \$875                                                                           | \$875                  | \$875                   | \$875                   |
| \$37,500     | \$39,999 | \$938                                                                           | \$938                  | \$938                   | \$938                   |
| \$40,000     | \$42,499 | \$1,000                                                                         | \$1,000                | \$1,000                 | \$1,000                 |
| \$42,500     | \$44,999 | \$1,063                                                                         | \$1,063                | \$1,063                 | \$1,063                 |
| \$45,000     | \$47,499 | \$1,125                                                                         | \$1,125                | \$1,125                 | \$1,125                 |
| \$47,500     | \$49,999 | \$1,188                                                                         | \$1,188                | \$1,188                 | \$1,188                 |
| \$50,000     | \$52,499 | \$1,250                                                                         | \$1,250                | \$1,250                 | \$1,250                 |
| \$52,500     | \$54,499 | \$1,313                                                                         | \$1,313                | \$1,313                 | \$1,313                 |
| \$55,000     | \$57,499 | \$1,375                                                                         | \$1,375                | \$1,375                 | \$1,375                 |
| \$57,500     | \$59,999 | \$1,438                                                                         | \$1,438                | \$1,438                 | \$1,438                 |
| \$60,000     | \$62,499 | \$1,500                                                                         | \$1,500                | \$1,500                 | \$1,500                 |
| \$62,500     | \$64,499 | \$1,563                                                                         | \$1,563                | \$1,563                 | \$1,563                 |
| \$64,500     | \$66,999 | \$1,613                                                                         | \$1,613                | \$1,613                 | \$1,613                 |
| \$67,000     | \$69,499 | \$1,675                                                                         | \$1,675                | \$1,675                 | \$1,675                 |
| \$69,500     | \$71,999 | \$1,738                                                                         | \$1,738                | \$1,738                 | \$1,738                 |
| \$72,000     | \$74,499 | \$1,800                                                                         | \$1,800                | \$1,800                 | \$1,800                 |

Ceiling Rent Reached  
for bedroom size

## Appendix E

# COMMUNITY BASED RENTAL ASSISTANCE (CBRA) POLICY

### Overview

INLIVIAN's Community Based Rental Assistance (CBRA) program (also known as the project-based voucher program) encompasses traditional project-based voucher units, Special Needs units (elderly, disabled, supportive housing, supportive service, and homeless), and pilot local rental subsidy programs. INLIVIAN will determine the percentage of housing choice voucher assistance that is project-based under the CBRA program based on organizational strategic goals and public housing authority and/or City/County revitalization efforts. The CBRA policy is also applicable to units converted to PBV under the Rental Assistance Demonstration (RAD) program.

### *Simplification of the Process to Project-Base Units*

INLIVIAN will utilize a simplified owner proposal selection process to project-base vouchers. INLIVIAN will select CBRA proposals by any of the following methods:

Units Owned by INLIVIAN. INLIVIAN is authorized to project-base Section 8 assistance at properties owned directly or indirectly by the Agency, subject to HUD's requirements regarding subsidy layering. Project-based assistance for such owned units does not need to be competitively bid, nor are the owned units subject to any assessments for voluntary conversion. Direct or indirect ownership interest includes, but is not limited to:

- ✓ INLIVIAN participation as a member in a tax credit or other LLC;
- ✓ Direct or indirect ownership interest through an INLIVIAN subsidiary;
- ✓ INLIVIAN ownership of the land on which the community has been or is to be developed; or
- ✓ INLIVIAN is funding a portion of the construction costs of the community and subsidizing the operating costs or rents of the community for low income families.

Request for Proposals. INLIVIAN may solicit proposals by using a request for proposals (RFP) process. The RFP process will select proposals on a competitive basis. INLIVIAN will not limit proposals to a single site or impose restrictions that explicitly or practically preclude owner submission of proposals for project-based housing on different sites.

Proposals that were Previously Selected Based on Competition. INLIVIAN may consider an application and select a proposal for housing assisted under a federal, state, or local government housing assistance, community development, or supportive services program (e.g. Low-Income Housing Tax Credit (LIHTC), HOME, Housing Trust Fund, Affordable Housing Program, etc.) that included a competitive process. INLIVIAN may consider such applications only if housing was competitively selected within three years of the proposal selection date and where the earlier competitive proposal did not involve any consideration that the project would receive project-based voucher assistance.

Joint Requests for Proposals with the City and State. INLIVIAN may award project-based voucher assistance via competitive process for other affordable housing funds to maximize the impact of its project-based vouchers and to minimize the number of application processes developers face.

## Appendix E

### **Solicitation and Selection of Proposals**

INLIVIAN will accept proposals on an ongoing basis. INLIVIAN may periodically advertise its request for proposals (RFP) for the target categories in The Charlotte Observer. In addition to, or in place of advertising, INLIVIAN may also directly contact specific owners that have already been selected through one of the competitive processes above to inform them of available project-based assistance.

In order for the proposal to be considered, the proposal must respond to all requirements as outlined in the RFP. Incomplete proposals will not be reviewed.

INLIVIAN will rate and rank proposals for in the target categories using the following criteria:

#### *Family Units*

1. Must be located in a permissible area which meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities. Preference will be given to proposals in which units are located in a High Opportunity Area that is characterized by: low poverty, low crime rate, access to high performing schools, access to transportation, access to employment opportunities and areas of redevelopment in order to preserve affordable housing options in gentrifying neighborhoods.
2. Families must have one member either working or participating in a work support program.
3. No more than 25% of the units in a family development will be project-based unless the development is providing some level of supportive services. (This does not apply to senior and special needs housing).
4. Developments in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail, will be given second priority.

#### *Special Needs Units*

1. Category includes units for homeless, disabled, domestic violence, transitional youth and other special needs.
2. Services must be being provided onsite or in coordination with the housing. Higher levels of service provision will be given first priority.
3. Must be located in a permissible area which meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities. Preference will be given to proposals in which units are located in a High Opportunity Area that is characterized by: low poverty, low crime rate, access to high performing schools, access to transportation, access to employment opportunities and areas of redevelopment in order to preserve affordable housing options in gentrifying neighborhoods. Developments in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail, will be given second priority.

#### *Senior Units*

1. Must be located in a permissible area which meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities. Preference will be given to proposals in which units are located in a High Opportunity Area that is characterized by: low poverty, low crime rate, access to high performing schools, access to

## Appendix E

transportation, access to employment opportunities and areas of redevelopment in order to preserve affordable housing options in gentrifying neighborhoods.

2. Developments in Uptown Charlotte or in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail, will be given second priority.

3. Services must be provided onsite or in coordination with the housing. Higher levels of service provision will be given priority if the locational criteria rank equally.

In addition to meeting the above criteria, each deal must meet HUD Site Selection Standards set forth in CFR 983.57. Each deal must also be in compliance with HUD subsidy layering rules, the Fair Housing Act, Davis-Bacon regulations for new construction and all other applicable HUD regulations.

Priority will be given to proposals in any target category that complement other local activities such as the redevelopment of a public housing site under the HOPE VI program, the HOME program, CDBG activities, other development activities in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community.

### **Prohibition of Assistance for Certain Units**

INLIVIAN will determine property eligibility criteria and may provide project-based assistance for transitional housing and other innovative housing types to address Charlotte's affordable housing needs.

### **Cap on the Number of Project-Based Units**

INLIVIAN will provide project-based assistance for excepted units in multifamily buildings that are specifically made available for elderly or disabled families or families receiving supportive services on a project-by-project basis with MTW and/or HUD approval.

In Supportive Housing developments (homeless, disabled, domestic violence, transitional youth, and/or special needs) with less than 20 units, INLIVIAN will provide project-based assistance up to 100% of the units in the project. In supportive housing developments (homeless, disabled, domestic violence, transitional youth, and/or special needs) with more than 20 units, INLIVIAN will provide project-based assistance up to 60% of the units in the project. Services must be provided in the coordination of housing for supportive housing developments. The types of services offered to families for a project to qualify for the exception will be determined on a project-by-project basis depending on the target population. Supportive Housing developments may use the McKinney Act definition of disabled for the purposes of determining eligibility for exempted units.

INLIVIAN will require reports to be submitted at least quarterly for supportive housing developments (excluding elderly and disabled developments) to ensure proper monitoring of excepted units.

In family developments or transitional housing programs, families must be receiving FSS supportive services or other self-sufficiency services to qualify for an excepted unit. INLIVIAN, contract service provider, and/or supportive service partner will monitor the excepted family's continued receipt of supportive services and take appropriate action regarding those families that fail without good cause to complete their supportive services requirement. INLIVIAN will require reports to be submitted at least quarterly for family developments to ensure proper monitoring of excepted units.

## Appendix E

### Site Selection Standards

Per INLIVIAN's MTW Agreement, the Authority is authorized to duly adopt, according to the requirements of local law, alternate standards for determining the location of existing, newly constructed or substantially rehabilitated housing to receive subsidy; provided, however, that in lieu of the Site Selection Standards currently set forth in 24 C.F.R. Section 983.57, the agency will comply with the following requirements:

- a. The Agency will comply with the Fair Housing Act and Title VI of the Civil Rights Act of 1964, and implementing regulations thereto, in determining the location of newly constructed or acquired public housing units.
- b. Units may be located in the agency's jurisdiction, including within, but not limited to, the following types of urban areas: (1) an area of revitalization that has been designated as such by the City of Charlotte and/or Mecklenburg County, including Redevelopment Areas and Enhanced Enterprise Communities, (2) an area where public housing units were previously constructed and were demolished, (3) a racially or economically impacted area where the agency plans to preserve existing affordable housing, (4) in connection with a HOPE VI or other HUD funded master planned development, (5) in areas where a needs analysis indicates that subsidized housing represents a low percentage of the total number of housing units in the area or (6) relocating units to an area with a lower concentration of public housing units.
- c. Conduct a housing needs analysis indicating that there is a real need for the housing in the area; and
- d. When developing or substantially rehabilitating six or more Section 8 project-based units, the agency will: (1) advise current residents of the subject properties and representative community groups in the vicinity of the subject property by letter to resident organizations and by public meeting, of the agency's revitalization plan and (2) certify to HUD in its MTW Annual Report that the comments from residents and representative community groups have been considered in the revitalization plan. Documentation evidencing that the agency has met the stated requirements will be maintained at the housing authority and submitted to HUD in its MTW Annual Report.

It is the goal of INLIVIAN to select sites for CBRA housing that provide for deconcentrating poverty and expanding housing and economic opportunities. In complying with this goal, INLIVIAN will limit approval of sites for project-based housing in census tracts that have poverty concentrations of 20 percent or less.

However, INLIVIAN will grant exceptions to the 20 percent standard where INLIVIAN determines that the project-based assistance will complement other local redevelopment activities designed to deconcentrate poverty and expand housing and economic opportunities in census tracts with poverty concentrations greater than 20 percent, such as sites in:

- ✓ A census tract in which the proposed development will be located in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community;
- ✓ A census tract where the concentration of assisted units will be or has decreased as a result of public housing demolition and HOPE VI redevelopment;
- ✓ A census tract in which the proposed development will be located is undergoing significant revitalization as a result of state, local, or federal dollars invested in the area;

## Appendix E

- ✓ A census tract where new market rate units are being developed where such market rate units will positively impact the poverty rate in the area;
- ✓ A census tract where there has been an overall decline in the poverty rate within the past five years; or
- ✓ A census tract where there are meaningful opportunities for educational and economic advancement.

Additionally, INLIVIAN will strive to get as many CBRA units as possible in stable Charlotte neighborhoods, neighborhoods where there is an and/or neighborhood along Charlotte's new transportation corridors, including the light rail. Priority will be given to developments that meet one or more of the following goals:

- ✓ Located in an area of low crime as determined by local law enforcement;
- ✓ Located in an area with access to high-performing public schools; or
- ✓ Located in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail.

### **Inspecting Units**

INLIVIAN will waive the requirement for an initial HQS inspection on newly constructed project-based units and utilize a Certificate of Occupancy (CO) in lieu of an initial inspection.

### **Site-Based Administration**

INLIVIAN's CBRA program may utilize simplified property management practices based on private management/private sector models instead of the traditional public housing authority managed project-based voucher model in order to simplify, streamline and enhance the delivery of management services to CBRA communities. INLIVIAN may delegate to the Owner Entities' professional management companies the full responsibility of administering all aspects of the CBRA program. This includes waiting list selection and administration, eligibility, admissions, and functions related to continued occupancy to include but not limited to regularly scheduled recertifications, interim recertifications and transfer moves, at the property level based on the community's approved tenant selection plan and INLIVIAN's Administrative Plan. The Owner Entities' property management is also authorized to administer grievance processes provided that no-cause evictions are not permitted, and all policies and practices comply with fair housing and other related requirements.

### **Lease**

INLIVIAN may waive the initial one-year lease requirement in Supportive Housing development and programs.

### **Family Right to Move**

INLIVIAN has received a waiver of 24 CFR 983.260 Family Right to Move, so that a family will not be offered the opportunity for continued tenant-based rental assistance if they terminate the lease at any time after one year of occupancy. Exceptions to the waiver may be made for:

- ✓ Occupancy of a wrong size unit due to change in family composition and property does not have an available unit that meets occupancy standards for the family's size;

## Appendix E

- ✓ Reasonable accommodation;
- ✓ Victims of domestic violence, dating violence, or stalking;
- ✓ Owner refusal to renew the lease without good cause; and
- ✓ Tenants that occupied RAD -PBV units the time of conversion

### **Determining Rent to Owner**

INLIVIAN has an approved waiver of 24 CFR 983.301 in order to implement a more market competitive determination of rent to owner process for the Community Based Rental Assistance (CBRA) program in order to:

- ✓ Create affordable housing developments through public/private partnerships using market principles that maximize the economic viability and sustainability of INLIVIAN's mixed-income communities.
- ✓ Meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities.
- ✓ Facilitate self-sufficiency among low-income families by increasing access to community resources and amenities that improve quality of life.

INLIVIAN's determination of rent to owner process may determine contract rents on a project-by-project basis up to 120% of HUDs fair market rents (FMRs) based on independent market study and analysis. Exceptions to the INLIVIAN Payment Standards may be granted with Administration approval based on the following factors:

- ✓ The quality of the housing regardless of the submarket.
- ✓ The location of the housing with respect to its proximity to revitalization/transformation activities and other public development initiatives.
- ✓ INLIVIAN's de-concentration efforts.
- ✓ INLIVIAN's RAD portfolio conversion.



## Appendix F

# FY 2021 PLANNED ADDITIONAL AGENCY ACTIVITIES

### PLANNED SITE DEVELOPMENT ACTIVITIES

#### **First Ward Place**

In 1993, the U.S. Department of Housing and Urban Development awarded then Earle Village one of the first HOPE VI Grants in the country. The grant was then leveraged with: (i) Low Income Housing Tax Credits (“LIHTC”) from the North Carolina Housing Finance Agency (“NCHFA”), (ii) commercial debt, and (iii) soft loans from both then Charlotte Housing Authority and Charlotte Mecklenburg Housing Partnership (“CMHP”). Earle Village was transformed into First Ward Place (the “Community”)

The 1993 revitalization plan for this public housing community resulted in the demolition of 386 of the 409 Earle Village units; the remaining 23 units were renovated. A total of 283 units were re-built on the Earle Village site, in 2 phases, including 23 existing units that remained and were reinvested to pay homage to Earle Village. Funds invested provided the needed capital that made the Community the catalyst for a renaissance in Uptown Charlotte. The tax credit compliance period has now expired, and all member interests have been acquired by INLIVIAN. Deferred maintenance issues exist throughout the Community and a disproportionate amount of subsidized to market rate units has left this Community in need of repair and upgrades and, operationally unsustainable.

INLIVIAN, through its development subsidiary, Horizon Development Properties, Inc. (“HDP”), intends to recapitalize First Ward Place, again in phases, with Phase I commencing with a 9% competitive tax credit application due January 24, 2021, with a target closing in Q4 2021. The Phase I-unit mix will remain as developed but the units will receive substantial renovations in order to improve them to the level of a class B property. INLIVIAN has approved the use of MTW funds to capitalize the predevelopment expenses for this recapitalization effort that will be funded with tax credit equity, commercial debt, and soft loans from the City and HDP.

#### **Tall Oaks**

Phase II of the Tall Oaks Redevelopment will continue to be pursued as designs are refined for a multifamily development planned for the remaining 2.7-acre site. Current plans being discussed with the neighbors and City officials proposes the development of 99 units with a majority of units being targeted to households between 60% and 80% of the area-median income to address the need for work-force housing in the neighborhood. The current plans are to move the Phase II activities to the construction phase in 2022 depending on availability of public resources. MTW funds will be used for predevelopment expenditures on Tall Oaks II.

#### **Tarleton Hills**

HDP continues to explore options available to redevelop the site of this 50-unit 100% RAD development situated near Uptown Charlotte. This site is very valuable with its views of the Charlotte skyline and is obsolete with its current density. The City planning staff is currently engaged in a small area planning process for this area of the City and has two planners developing concepts for the neighborhood that includes the Tarleton Hills site. HDP intends to redevelop this site using a special purpose entity (“Company”) that will own the redeveloped community.

## Appendix F

INLIVIAN will use MTW funds to capitalize the Company in order to fund a predevelopment budget. As part of any redevelopment, HDP will also look to potentially execute a Transfer Of Assistance (“**TOA**”) of the RAD operating subsidies to other communities HDP is developing through joint venture agreements in Public Private Partnerships (“**P3**”) in order to vacate the 100% extremely low income units in the community to prepare the site to be redeveloped as a mixed-income community with increased density that is reflective of diversified price point housing.

### Hall House

HDP anticipated the redevelopment of the Hall House site located at 426 N. Tryon Street as a mixed-use, mixed-income project (the “**Project**”). To that end, HDP and Urban-Atlantic Development LLC, a Delaware limited Liability Company (“**Urban**” or “**UA**”), entered into a certain Transaction Outline (the “**Original Transaction Outline**”) with respect to the Project. At some point, the Project changed from being a two-block strategy with multiple land sellers and a mixed-use, mixed-income building that straddled the INLIVIAN and Bank of America parcels bounded by N. Tryon, College, 7<sup>th</sup> and 8<sup>th</sup> Streets, to being confined to the INLIVIAN parcel. HDP and Urban (hereinafter the “**Parties**” or “**Joint Venture**”) then agreed to amend, restate and replace the terms and conditions of the Original Transaction Outline that established the principal terms of a joint-venture agreement (“**Joint Venture Agreement**”) between the Parties to develop the Project on the INLIVIAN parcel only.

The Parties are proposing to develop the Project with an ultimate affordable housing target for the multifamily units of 70/30/30; in which 70% of the units are at market rate and 30% are below market rate; with 30% of the below market rate units priced at 30% of the Area Median Income (“**AMI**”). The total affordable units of the Project will consist of a mix of 30%, 60%, and 80% AMI apartments. Further, the Joint Venture will fully intersperse the affordable multifamily units throughout the Project (“**Affordable Units Component**”). Currently the range of financial support required to facilitate the development and construction of the Affordable Units Component (the “**Gap**”) is estimated to be up to \$6 million. The County has provided a conditional commitment for this Gap funding. Should there be a variance in the development costs or operating expenses of the Affordable Units Component, the Gap is subject to change. In order to fund the balance of the total development costs for the Affordable Units, the Parties wish to submit an application for bond volume cap and 4% Low Income Housing Tax Credits (“**LIHTC**”) to the North Carolina Housing Finance Agency (“**NCHFA**”) on January 24, 2021.

### Strawn Cottages

Strawn Cottages, now known as Centre South, experienced delays due to the pandemic but is expected to break ground in 2021, contingent on a lease execution by an anchor tenant for the office tower. The private developer partner, The Fallon Company, is currently working on the marketing and pre-leasing for the office component and major efforts are focused on signing an anchor tenant. The office building design work is complete, and we expect permitting to occur in 2021 for a construction start of December 2021. Design work is underway for the residential component with permitting expected to occur in 2021 as well with construction commencing late fall 2022.

## Appendix F

### **Gladedale Apartments**

INLIVIAN is pursuing opportunities to redevelop the existing 49 units at Gladedale. This site is obsolete in that its location would allow for a much higher density to add workforce housing to the lower income program at this parcel. HDP intends to redevelop this site using a special purpose entity (“Company”) that will own the redeveloped community. INLIVIAN will use MTW funds to capitalize the Company in order to fund a predevelopment budget. As part of any redevelopment, HDP will also look to potentially execute a Transfer Of Assistance (“**TOA**”) of the RAD operating subsidies to other communities HDP is developing through joint venture agreements in P3s (defined below”) in order to vacate the 100% extremely low income units in the community to prepare the site to be redeveloped as a mixed-income community with increased density that is reflective of diversified price point housing.

### **Hampton Crest**

Hampton Crest is a mixed income development, that is in need of significant rehabilitation. It is the intent of INLIVIAN to redevelop this site. The unit make up includes 153 market-rate units that are naturally occurring affordable housing (NOAHs), along with 60 RAD Voucher units for a total of 213 units. HDP will publish an RFP for Developer Partners in 2020 for this site to determine the plan of development.

### **Oak Valley**

Oak Valley is a 50-unit apartment complex built in 1988. It is HDP’s intent to substantially rehabilitate Oak Valley using MTW program funds if the submitted MTW Plan Amendment is approved by HUD. Successful completion of this rehabilitation will preserve this much needed affordable housing for some years to come.

### **Valley View**

Built in 1984, the 50 units at Valley View Apartments are in need of extensive renovations. It is HDP’s intent to substantially rehabilitate Valley View using MTW program funds if the submitted MTW Plan Amendment is approved by HUD. Successful completion of this rehabilitation will preserve this much needed affordable housing for some years to come.

### **Grove Place**

The Grove Place Apartments is a 36-unit family community located in the Hickory Grove area of Charlotte. Built in 1988, the original existing structural systems are light-frame wood construction with plywood sheathing on engineered roof trusses, with sawn lumber floor framing. Grove Place has been experiencing severe structural deficiencies at the slabs, balconies and exterior stairs and is in dire need of substantial renovations. A recent structural report found open ceiling joints, separating portal sills, and cracked concrete slabs in the units and breezeways. It is HDP’s intent to substantially rehabilitate Grove Place using MTW program funds if the submitted MTW Plan Amendment is approved by HUD. Successful completion of this rehabilitation will preserve this much needed affordable housing for some years to come.

### **Sunridge Apartments**

Built in 1978, the 44 units at Sunridge Apartments are in need of extensive renovations. It is HDP’s intent to substantially rehabilitate Sunridge Apartments using MTW program funds if the submitted

## Appendix F

MTW Plan Amendment is approved by HUD. Successful completion of this rehabilitation will preserve this much needed affordable housing for some years to come.

### **Fairmarket Apartments**

Built in 1990, the 60 units at Sunridge Apartments are in need of extensive renovations. It is HDP's intent to substantially rehabilitate Fairmarket Apartments using MTW program funds if the submitted MTW Plan Amendment is approved by HUD. Successful completion of this rehabilitation will preserve this much needed affordable housing for some years to come.

### **McAlpine Terrace**

McAlpine Terrace is a 113-unit apartment complex designated for the elderly and disabled. In 2019, McAlpine received extensive renovations to the kitchens and bathrooms in 30 of the 113 units. It is HDP's plan to complete the renovations on the remaining 83 units including the common areas and window replacement. It is HDP's intent to complete the substantial rehabilitate of McAlpine Terrace using MTW program funds if the submitted MTW Plan Amendment is approved by HUD. Successful completion of this rehabilitation will preserve this much needed affordable housing for some years to come.

### **Autumn Place**

Autumn Place is a 68-unit, 4-story seniors building located in a highly desirable area of Charlotte. Built as part of the original 1993 Earle Village HOPE VI development, Autumn Place is in need of renovations. Through Capital Projects, Autumn Place is undergoing substantial renovations and in order to bring the building up to current code, additional funds are needed to complete the work. It is INLIVIAN'S intent to use MTW Plan Amendment funds, if approved by HUD to complete these improvements and to preserve this affordable housing for our seniors.

### **Seneca Woods**

INLIVIAN, through its development arm HDP continues to explore options available to redevelop this 50-unit mixed income affordable development situated in the Park Woodlawn Neighborhood in Charlotte. This site is very valuable since it is located in an area of opportunity with access to good schools and employment. The site is obsolete physically and as it relates to its current density. It is also experiencing structural deficiencies that are causing the design team to advise demolition. However, construction costs are high in Charlotte, but the rents have not caught up to the cost to build. As a result, redevelopment with higher density may not be an option but HDP continues to vet this decision. If this decision is determined to be infeasible, HDP will apply for tax credits and complete a substantial rehabilitation. HDP intends to either redevelop or acquire and rehabilitate this site using a special purpose entity ("Company") that will own the redeveloped community. INLIVIAN will use MTW funds to capitalize the Company in order to fund a predevelopment budget. If newly anticipated MTW Plan Amendment (2020-2 Development Protection Fund, submitted to HUD on 10/30/2020) is successfully approved, INLIVIAN intends to utilize associated funding flexibility for these efforts.

## Appendix F

### PLANNED ACQUISITION ACTIVITIES

#### **Strategy**

INLIVIAN/HDP may consider an acquisition strategy based on expiring tax credits or other methods that will benefit the people routinely served by our agencies.

#### **Baxter Street**

HDP is planning a new mixed-use, mixed-income development with workforce housing on land adjacent to another existing INLIVIAN development, Charlottetown Terrace. The program being considered includes 223 units of rental housing; however, the current zoning in this area is causing INLIVIAN to consider adding a mixed-use component on the lower level for which HDP would include a private partner to develop.

#### **Private/Public/Partnerships (P3)**

The goal of the P3 Program is to partner with third party developers in an effort to increase the number of affordable housing units in and around the City of Charlotte. INLIVIAN also seeks to use these new communities to mainstream the agency's RAD vouchers to redevelop obsolete sites, thereby increasing the density and further adding units to the city and providing greater housing choices to our clients. These sites are all located in high opportunity or opportunity areas by definition and are close to job opportunities and mass transit for our clients. It also gives INLIVIAN clients a chance to move into a community not historically known as being federally subsidized. By utilizing all potentially available resources at INLIVIAN's disposal, the P3 Program is allowing INLIVIAN to further its affordable housing mission. Further, HDP is the managing member or general partner in each of the ownership entities with the right of first refusal to purchase the property and the interests of all members at the end of the initial compliance period. This means an increase in our portfolio of 1,129 unit from our 2020-2021 efforts. All P3 projects are in various stages of construction with completion and lease up anticipated in 2021. These P3 projects may necessitate usage of MTW funding flexibility.

Current opportunities which have closed and are under construction or that are targeted for closing include: Archdale Flats – Family (202), Archdale Flats – Seniors 131), Abbington on Mt. Holly (102), Freedom Flats (220), Ashley Flats (150), Evoke Living at Westerly Hills (156), and Evoke Living at Arrowwood (168).

#### **Opportunity Development**

INLIVIAN/HDP may explore purchasing other Class B or C apartment complexes in a High or Very High Opportunity Census tract to continue agency efforts to deconcentrate poverty. MTW funds may be used in these efforts.

### PLANNED OTHER ACTIVITIES

#### **Renaissance Police Memorial**

Two CMPD officers were killed at the former Boulevard Homes in 1993. The capstone project for this HOPE VI redevelopment will be some form of memorial or monument at the intersection of the two streets on the development named for these fallen heroes. MTW funds will be used for this project.

## Appendix F

### **Brooklyn Village**

INLIVIAN/HDP is exploring the possibility of a partnership with the City of Charlotte, Mecklenburg County and other development partners to revitalize Second Ward in Uptown Charlotte, bringing affordable housing back to this section of Charlotte's urban core. MTW funds may be used in this effort.

## Appendix G

### FY 2021 PLANNED DEMOLITION/DISPOSITION ACTIVITY

| Demolition/Disposition Activity Description                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------|
| 1a. Development name: <b>Hall House</b>                                                                                     |
| 1b. Development (project) number: NC0030061                                                                                 |
| 2. Activity type:   X Demolition<br>X Disposition                                                                           |
| 3. Application status<br>Approved<br>Submitted, pending approval<br>Currently undergoing a RAD transfer of assistance.      |
| 4. Date application approved, submitted, or planned for submission: 2017                                                    |
| 5. Number of units affected: 191                                                                                            |
| 6. Coverage of action<br>Part of the development<br>X Total development                                                     |
| 7. Timeline for activity:<br>a. Actual or projected start date of activity: 2020<br>b. Projected end date of activity: 2023 |

| Demolition/Disposition Activity Description                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------|
| 1a. Development name: <b>Strawn Apartments</b>                                                                              |
| 1b. Development (project) number: 3-58                                                                                      |
| 2. Activity type:   Demolition<br>X Disposition                                                                             |
| 3. Application status<br>Approved<br>X Submitted, pending approval<br>Planned application                                   |
| 4. Date application approved, submitted, or planned for submission 12/31/2016                                               |
| 5. Number of units affected: 122                                                                                            |
| 6. Coverage of action<br>X Part of the development<br>Total development                                                     |
| 7. Timeline for Activity:<br>a. Actual or projected start date of activity: 2016<br>b. Projected end date of activity: 2023 |

## Appendix G

| Demolition/Disposition Activity Description                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------|
| 1a. Development name: <b>Dillehay Courts</b>                                                                                               |
| 1b. Development (project) number: NC003000012                                                                                              |
| 2. Activity type: <input checked="" type="checkbox"/> Demolition<br><input type="checkbox"/> Disposition                                   |
| 3. Application status<br><input checked="" type="checkbox"/> To Be submitted, pending approval                                             |
| 4. Date application approved, submitted, or planned for submission: 2020                                                                   |
| 5. Number of units affected: 136                                                                                                           |
| 6. Coverage of action<br><input checked="" type="checkbox"/> Part of the development<br><input type="checkbox"/> Total development         |
| 7. Timeline for activity:<br>a. Actual or projected start date of activity: 2020<br>b. Projected end date of activity: 2022 (Phase I only) |

| Demolition/Disposition Activity Description                                                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1a. Development name: <b>Tall Oaks</b>                                                                                                                                                     |
| 1b. Development (project) number: 3-20                                                                                                                                                     |
| 2. Activity type: <input checked="" type="checkbox"/> Demolition<br><input checked="" type="checkbox"/> Disposition                                                                        |
| 3. Application status<br><input type="checkbox"/> Approved<br><input type="checkbox"/> Submitted, pending approval<br><input checked="" type="checkbox"/> Currently undergoing RAD review. |
| 4. Date application approved, submitted, or planned for submission: 2012-2016                                                                                                              |
| 5. Number of units affected: 79                                                                                                                                                            |
| 6. Coverage of action<br><input type="checkbox"/> Part of the development<br><input checked="" type="checkbox"/> Total development                                                         |
| 7. Timeline for activity:<br>a. Actual or projected start date of activity: 2012-2016<br>b. Projected end date of activity: 2022                                                           |



## Appendix H

### Agency's Updated RAD Significant Amendment

Please see the following pages for the agency's proposed changes to its RAD Significant Amendment applicable for FY 2021.

DRAFT

### **Rental Assistance Demonstration (RAD) Significant Amendment**

The Housing Authority of the City of Charlotte is amending its FY2016 Moving Forward Annual Plan because it was a successful applicant in the Rental Assistance Demonstration (RAD). As a result, the Housing Authority of the City of Charlotte will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-2 and any successor Notices. Upon conversion to Project Based Vouchers the Authority will adopt the PBV Residents Rights and Participation that cannot be altered by MTW flexibility. These are listed in Section 1.6.C & 1.6.D of PIH Notice 2012-32, REV-2. The PBV Resident Rights and Participation applicable to INLIVIAN's RAD conversion are appended to this Attachment. Additionally, the Housing Authority of the City of Charlotte is currently compliant with all fair housing and civil rights requirements and is not under a Voluntary Compliance Agreement.

RAD was designed by HUD to assist in addressing the capital needs of public housing by providing the Housing Authority of the City of Charlotte with access to private sources of capital to repair and preserve its affordable housing assets. Please be aware that upon conversion, the Authority's Capital Fund Budget will be reduced by the pro rata share of Public Housing Developments converted as part of the Demonstration, and that Housing Authority of the City of Charlotte may also borrow funds to address their capital needs. At this time, INLIVIAN will be researching all options and maintaining continued service requirements will be a high priority for the agency. We do not anticipate any reductions due to RAD.

The Housing Authority of the City of Charlotte will also be contributing Operating Reserves up to the maximum available amount per property as defined per the RAD notice, subject to HUD and Board approval. The Housing Authority of the City of Charlotte currently has debt under the Capital Fund Financing Program and will be working with US Bank to address outstanding debt issues. Regardless of any funding changes that may occur as a result of conversion under RAD, the Housing Authority of the City of Charlotte certifies that it will maintain its continued service level for its remaining portfolio of public housing units

Below, please find specific information related to the Public Housing Development (s) selected for RAD:

Appendix H

|                                                                         |                                                                                                                |                                        |                                                                                                                                       |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Southside                        | PIC Development ID:<br>NC003000003                                                                             | Conversion type:<br>PBV                | Transfer of Assistance:<br>2 units                                                                                                    |
| Total Units:<br>394                                                     | Pre-RAD Unit Type:<br>Family                                                                                   | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$529,754                                                                                     |
| <b>Bedroom Type</b>                                                     | <b>Number of Units Pre-Conversion</b>                                                                          | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                       | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| One Bedroom                                                             | 65                                                                                                             | 73                                     | 8                                                                                                                                     |
| Two Bedroom                                                             | 233                                                                                                            | 221                                    | -12                                                                                                                                   |
| Three Bedroom                                                           | 86                                                                                                             | 88                                     | 2                                                                                                                                     |
| Four Bedroom                                                            | 10                                                                                                             | 10                                     | 0                                                                                                                                     |
| Five Bedroom                                                            | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                             | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Total Units                                                             | 394                                                                                                            | 392                                    | -2 (special use units)                                                                                                                |
| If performing a Transfer of Assistance:                                 | The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services <sup>1</sup> : | 392                                                                                                            |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>First Ward         | PIC Development ID:<br>NC003000005    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>132                                       | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$191,069                                                                                     |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 8                                     | 8                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 68                                    | 68                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 43                                    | 43                                     | 0                                                                                                                                     |
| Four Bedroom                                              | 12                                    | 12                                     | 0                                                                                                                                     |
| Five Bedroom                                              | 1                                     | 1                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 132                                   | 132                                    | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 132                                   |                                        |                                                                                                                                       |

<sup>1</sup> INLIVIAN meets the RAD notice to Project-Base 100% of the units because the number of families that are elderly, disabled or eligible to receive supportive services exceeds 50% of the total RAD PBV units.

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Edwin Towers       | PIC Development ID:<br>NC003000006    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>176                                       | Pre-RAD Unit Type:<br>Senior          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$205,351                                                                                     |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 64                                    | 64                                     | 0                                                                                                                                     |
| One Bedroom                                               | 96                                    | 96                                     | 0                                                                                                                                     |
| Two Bedroom                                               | 16                                    | 16                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 176                                   | 176                                    | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 176                                   |                                        |                                                                                                                                       |

|                                                           |                                                                                                                |                                        |                                                                                                                                       |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Arbor Glen         | PIC Development ID:<br>NC003000009                                                                             | Conversion type:<br>PBV                | Transfer of Assistance:<br>4 units                                                                                                    |
| Total Units:<br>29                                        | Pre-RAD Unit Type:<br>Family                                                                                   | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$42,491                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                          | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 4                                                                                                              | 4                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 10                                                                                                             | 6                                      | -4                                                                                                                                    |
| Three Bedroom                                             | 13                                                                                                             | 13                                     | 0                                                                                                                                     |
| Four Bedroom                                              | 2                                                                                                              | 2                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 29                                                                                                             | 25                                     | -4                                                                                                                                    |
| If performing a Transfer of Assistance:                   | The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 25                                                                                                             |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Arbor Glen I       | PIC Development ID:<br>NC003000010    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>60                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$78,789                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 42                                    | 42                                     | 0                                                                                                                                     |
| Two Bedroom                                               | 12                                    | 12                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 6                                     | 6                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 60                                    | 60                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   |                                       |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 60                                    |                                        |                                                                                                                                       |

|                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                        |                                                                                                                                       |
|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Dillehay Courts    | PIC Development ID:<br>NC003000012                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>136                                       | Pre-RAD Unit Type:<br>Family                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$219,186                                                                                     |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <del>0</del> 2                         | <del>0</del> 2                                                                                                                        |
| Two Bedroom                                               | 12                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <del>12</del> 17                       | <del>0</del> 5                                                                                                                        |
| Three Bedroom                                             | 68                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <del>68</del> 17                       | <del>0</del> 51                                                                                                                       |
| Four Bedroom                                              | 48                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <del>48</del> 0                        | <del>0</del> 48                                                                                                                       |
| Five Bedroom                                              | 8                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <del>8</del> 0                         | <del>0</del> 8                                                                                                                        |
| Six Bedroom                                               | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 136                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 136                                    | <del>0</del> 100                                                                                                                      |
| If performing a Transfer of Assistance:                   | <u><a href="#">N/A Subsidy will be transferred to a P3 new development in Charlotte that INLIVIAN's development instrumentality, Horizon Development Partners, Inc. is developing with a private partner. HDP is the controlling member in the partnership and has the right of first refusal to purchase the property and all member interests after the initial 15-year compliance period for tax credits has expired. The remaining 100 units will be demolished pursuant to using a</a></u> |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                        |                                                                                                                                       |

Appendix H

|                                                                                 |                                       |                                        |                                                                                                                                       |
|---------------------------------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Cedar Knoll/ Leafcrest/<br>Mallard Ridge | PIC Development ID:<br>NC003000016    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>132                                                             | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$198,729                                                                                     |
| <b>Bedroom Type</b>                                                             | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                                                     | 15                                    | 15                                     | 0                                                                                                                                     |
| Two Bedroom                                                                     | 42                                    | 42                                     | 0                                                                                                                                     |
| Three Bedroom                                                                   | 61                                    | 61                                     | 0                                                                                                                                     |
| Four Bedroom                                                                    | 14                                    | 14                                     | 0                                                                                                                                     |
| Five Bedroom                                                                    | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                                     | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                                                     | 132                                   | 132                                    | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                                         | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:                       | 97                                    |                                        |                                                                                                                                       |

|                                                           |                                                                                                                |                                        |                                                                                                                                       |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Charlottetown      | PIC Development ID:<br>NC003000018                                                                             | Conversion type:<br>PBV                | Transfer of Assistance:<br>19 units                                                                                                   |
| Total Units:<br>180                                       | Pre-RAD Unit Type:<br>Disabled                                                                                 | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$204,394                                                                                     |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                          | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 139                                                                                                            | 125                                    | -14                                                                                                                                   |
| One Bedroom                                               | 40                                                                                                             | 36                                     | -4                                                                                                                                    |
| Two Bedroom                                               | 1                                                                                                              | 0                                      | -1                                                                                                                                    |
| Three Bedroom                                             | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 180                                                                                                            | 161                                    | -19                                                                                                                                   |
| If performing a Transfer of Assistance:                   | The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 161                                                                                                            |                                        |                                                                                                                                       |

Appendix H

|                                                                              |                                       |                                        |                                                                                                                                       |
|------------------------------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Tall Oaks/Tarlton Hills/Savanna Woods | PIC Development ID:<br>NC003000020    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>149                                                          | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$225,454                                                                                     |
| <b>Bedroom Type</b>                                                          | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                            | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                                                  | 25                                    | 25                                     | 0                                                                                                                                     |
| Two Bedroom                                                                  | 52                                    | 52                                     | 0                                                                                                                                     |
| Three Bedroom                                                                | 50                                    | 50                                     | 0                                                                                                                                     |
| Four Bedroom                                                                 | 22                                    | 22                                     | 0                                                                                                                                     |
| Five Bedroom                                                                 | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                                  | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                                                  | 149                                   | 149                                    | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                                      | <a href="#">N/A See Note E Below</a>  |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:                    | 50                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Autumn Place       | PIC Development ID:<br>NC003000022    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>68                                        | Pre-RAD Unit Type:<br>Elderly         | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$ 82,776                                                                                     |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 65                                    | 65                                     | 0                                                                                                                                     |
| Two Bedroom                                               | 3                                     | 3                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 68                                    | 68                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 68                                    |                                        |                                                                                                                                       |

Appendix H

|                                                                                |                                            |                                             |                                                                                                                                                           |
|--------------------------------------------------------------------------------|--------------------------------------------|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Meadow Oaks/Gladedale/<br>Wallace Woods | PIC Development ID:<br>NC003000025         | Conversion type:<br>PBV                     | Transfer of Assistance:<br>None                                                                                                                           |
| Total Units:<br>129                                                            | Pre-RAD Unit Type:<br>Family               | Post-RAD Unit Type if<br>different:         | Capital Fund allocation of<br>Development: \$196,460                                                                                                      |
| <b>Bedroom Type</b>                                                            | <b>Number of Units Pre-<br/>Conversion</b> | <b>Number of Units Post-<br/>Conversion</b> | <b>Change in Number of<br/>Units per Bedroom Type<br/>and Why (De Minimis<br/>Reduction, Transfer of<br/>Assistance, Unit<br/>Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                              | 0                                          | 0                                           | 0                                                                                                                                                         |
| One Bedroom                                                                    | 11                                         | 11                                          | 0                                                                                                                                                         |
| Two Bedroom                                                                    | 42                                         | 42                                          | 0                                                                                                                                                         |
| Three Bedroom                                                                  | 68                                         | 68                                          | 0                                                                                                                                                         |
| Four Bedroom                                                                   | 8                                          | 8                                           | 0                                                                                                                                                         |
| Five Bedroom                                                                   | 0                                          | 0                                           | 0                                                                                                                                                         |
| Six Bedroom                                                                    | 0                                          | 0                                           | 0                                                                                                                                                         |
| Total Units                                                                    | 129                                        | 129                                         | 0                                                                                                                                                         |
| If performing a Transfer<br>of Assistance:                                     | <a href="#">See Note E Below</a> N/A       |                                             |                                                                                                                                                           |
| # of Elderly, Disabled, or<br>Receiving Supportive<br>Services:                | 0                                          |                                             |                                                                                                                                                           |

|                                                                 |                                            |                                             |                                                                                                                                                           |
|-----------------------------------------------------------------|--------------------------------------------|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Sunridge/Robinsdale      | PIC Development ID:<br>NC003000028         | Conversion type:<br>PBV                     | Transfer of Assistance:<br>None                                                                                                                           |
| Total Units:<br>74                                              | Pre-RAD Unit Type:<br>Family               | Post-RAD Unit Type if<br>different:         | Capital Fund allocation of<br>Development: \$112,283                                                                                                      |
| <b>Bedroom Type</b>                                             | <b>Number of Units Pre-<br/>Conversion</b> | <b>Number of Units Post-<br/>Conversion</b> | <b>Change in Number of<br/>Units per Bedroom Type<br/>and Why (De Minimis<br/>Reduction, Transfer of<br/>Assistance, Unit<br/>Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                               | 0                                          | 0                                           | 0                                                                                                                                                         |
| One Bedroom                                                     | 4                                          | 4                                           | 0                                                                                                                                                         |
| Two Bedroom                                                     | 23                                         | 23                                          | 0                                                                                                                                                         |
| Three Bedroom                                                   | 43                                         | 43                                          | 0                                                                                                                                                         |
| Four Bedroom                                                    | 4                                          | 4                                           | 0                                                                                                                                                         |
| Five Bedroom                                                    | 0                                          | 0                                           | 0                                                                                                                                                         |
| Six Bedroom                                                     | 0                                          | 0                                           | 0                                                                                                                                                         |
| Total Units                                                     | 74                                         | 74                                          | 0                                                                                                                                                         |
| If performing a Transfer<br>of Assistance:                      | N/A                                        |                                             |                                                                                                                                                           |
| # of Elderly, Disabled, or<br>Receiving Supportive<br>Services: | 0                                          |                                             |                                                                                                                                                           |



Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Park @ Oaklawn     | PIC Development ID:<br>NC003000030    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>89                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$84,539                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 46                                    | 46                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 39                                    | 39                                     | 0                                                                                                                                     |
| Four Bedroom                                              | 4                                     | 4                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 89                                    | 89                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 89                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Rivermere          | PIC Development ID:<br>NC003000031    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>20                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$18,832                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 12                                    | 12                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 8                                     | 8                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 20                                    | 20                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 0                                     |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                        |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Arbor Glen II      | PIC Development ID:<br>NC003000032    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                        |
| Total Units:<br>40                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$37,087                                                                                       |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why: (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                      |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                      |
| Two Bedroom                                               | 27                                    | 27                                     | 0                                                                                                                                      |
| Three Bedroom                                             | 13                                    | 13                                     | 0                                                                                                                                      |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                      |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                      |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                      |
| Total Units                                               | 40                                    | 40                                     | 0                                                                                                                                      |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                        |
| # of Elderly, Disabled, or Receiving Supportive Services: | 40                                    |                                        |                                                                                                                                        |

|                                                           |                                       |                                        |                                                                                                                                        |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Nia Point          | PIC Development ID:<br>NC003000033    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                        |
| Total Units:<br>29                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$26,874                                                                                       |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why: (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                      |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                      |
| Two Bedroom                                               | 16                                    | 16                                     | 0                                                                                                                                      |
| Three Bedroom                                             | 13                                    | 13                                     | 0                                                                                                                                      |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                      |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                      |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                      |
| Total Units                                               | 29                                    | 29                                     | 0                                                                                                                                      |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                        |
| # of Elderly, Disabled, or Receiving Supportive Services: | 29                                    |                                        |                                                                                                                                        |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Arbor Glen III     | PIC Development ID:<br>NC003000035    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>12                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$11,216                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 8                                     | 8                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 4                                     | 4                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 12                                    | 12                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 12                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>McAden Park        | PIC Development ID:<br>NC003000037    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>30                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$26,387                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 3                                     | 3                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 18                                    | 18                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 9                                     | 9                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 30                                    | 30                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 30                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Stonehaven         | PIC Development ID:<br>NC003000038    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>24                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$20,721                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 6                                     | 6                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 16                                    | 16                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 2                                     | 2                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 24                                    | 24                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 24                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Montgomery Gardens | PIC Development ID:<br>NC003000039    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>20                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$18,510                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 14                                    | 14                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 6                                     | 6                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 20                                    | 20                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 20                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                                                                                                           |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Prosperity Creek   | PIC Development ID:<br>NC003000040                                                                                        | Conversion type:<br>PBV                | Transfer of Assistance:<br>84 units                                                                                                   |
| Total Units:<br>72                                        | Pre-RAD Unit Type:<br>Elderly                                                                                             | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$51,227                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                                     | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 72                                                                                                                        | 144                                    | 72                                                                                                                                    |
| Two Bedroom                                               | 0                                                                                                                         | 12                                     | 12                                                                                                                                    |
| Three Bedroom                                             | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 72                                                                                                                        | 156                                    | 84                                                                                                                                    |
| If performing a Transfer of Assistance:                   | <b>This will allow the property to be governed by a single program / HAP Contract. No changes to the policy expected.</b> |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 156                                                                                                                       |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>South Oak Crossing | PIC Development ID:<br>NC003000041    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>20                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$19,329                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 10                                    | 10                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 10                                    | 10                                     | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 20                                    | 20                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 20                                    |                                        |                                                                                                                                       |

Appendix H

|                                                            |                                       |                                        |                                                                                                                                       |
|------------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Springfield Gardens | PIC Development ID:<br>NC003000042    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>22                                         | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$20,901                                                                                      |
| <b>Bedroom Type</b>                                        | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                          | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                                | 11                                    | 11                                     | 0                                                                                                                                     |
| Three Bedroom                                              | 11                                    | 11                                     | 0                                                                                                                                     |
| Four Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                                | 22                                    | 22                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                    | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:  | 22                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>940 Brevard        | PIC Development ID:<br>NC003000044    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>40                                        | Pre-RAD Unit Type:<br>Elderly         | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$28,619                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 40                                    | 40                                     | 0                                                                                                                                     |
| Two Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 40                                    | 40                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 40                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Seigle Point       | PIC Development ID:<br>NC003000045    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>102                                       | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$94,569                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 6                                     | 6                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 42                                    | 42                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 54                                    | 54                                     | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 102                                   | 102                                    | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 102                                   |                                        |                                                                                                                                       |

|                                                                  |                                       |                                        |                                                                                                                                       |
|------------------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Springcroft @ Ashley Park | PIC Development ID:<br>NC003000046    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>18                                               | Pre-RAD Unit Type:<br>Elderly         | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$12,891                                                                                      |
| <b>Bedroom Type</b>                                              | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                                      | 18                                    | 18                                     | 0                                                                                                                                     |
| Two Bedroom                                                      | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                                    | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                                     | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                                     | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                      | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                                      | 18                                    | 18                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                          | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:        | 18                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>McAlpine           | PIC Development ID:<br>NC003000048    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>26                                        | Pre-RAD Unit Type:<br>Senior          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$18,602                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 26                                    | 26                                     | 0                                                                                                                                     |
| Two Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 26                                    | 26                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 26                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Glen Cove          | PIC Development ID:<br>NC003000049    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>10                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$9,574                                                                                       |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 5                                     | 5                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 5                                     | 5                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 10                                    | 10                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 10                                    |                                        |                                                                                                                                       |



Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Fairmarket Square  | PIC Development ID:<br>NC003000050    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>16                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different        | Capital Fund allocation of Development: \$15,508                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 8                                     | 8                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 8                                     | 8                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 16                                    | 16                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 16                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>McCreesh II        | PIC Development ID:<br>NC003000051    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>63                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development:\$ 36,655                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 63                                    | 63                                     | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 63                                    | 63                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 63                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Seneca Woods       | PIC Development ID:<br>NC003000052    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>17                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$16,267                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 8                                     | 8                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 9                                     | 9                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 17                                    | 17                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | <a href="#">See Note E Below</a> N/A  |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 17                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Ashley Park        | PIC Development ID:<br>NC003000053    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>22                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$18,954                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 22                                    | 22                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 22                                    | 22                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 22                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Hampton Creste     | PIC Development ID:<br>NC003000054    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>60                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$54,287                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 8                                     | 8                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 44                                    | 44                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 8                                     | 8                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 60                                    | 60                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | <a href="#">N/A See Note E Below</a>  |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 60                                    |                                        |                                                                                                                                       |

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Moore Place        | PIC Development ID:<br>NC003000055    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>34                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$24,712                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 34                                    | 34                                     | 0                                                                                                                                     |
| Two Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 34                                    | 34                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 34                                    |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                                                                                                           |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Steele Creek       | PIC Development ID:<br>NC003000056                                                                                        | Conversion type:<br>PBV                | Transfer of Assistance:<br>60 units                                                                                                   |
| Total Units:<br>60                                        | Pre-RAD Unit Type:<br>Senior                                                                                              | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$38,721                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                                     | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 60                                                                                                                        | 102                                    | 42                                                                                                                                    |
| Two Bedroom                                               | 0                                                                                                                         | 18                                     | 18                                                                                                                                    |
| Three Bedroom                                             | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 60                                                                                                                        | 120                                    | 60                                                                                                                                    |
| If performing a Transfer of Assistance:                   | <b>This will allow the property to be governed by a single program / HAP Contract. No changes to the policy expected.</b> |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 120                                                                                                                       |                                        |                                                                                                                                       |

|                                                           |                                                                                                                           |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Woodlawn House     | PIC Development ID:<br>NC003000057                                                                                        | Conversion type:<br>PBV                | Transfer of Assistance:<br>52 units                                                                                                   |
| Total Units:<br>52                                        | Pre-RAD Unit Type:<br>Elderly                                                                                             | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$695.29                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                                     | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 34                                                                                                                        | 68                                     | 34                                                                                                                                    |
| Two Bedroom                                               | 18                                                                                                                        | 36                                     | 18                                                                                                                                    |
| Three Bedroom                                             | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                                         | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 52                                                                                                                        | 104                                    | 52                                                                                                                                    |
| If performing a Transfer of Assistance:                   | <b>This will allow the property to be governed by a single program / HAP Contract. No changes to the policy expected.</b> |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 104                                                                                                                       |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                       |                                        |                                                                                                                                       |
|-----------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>McMullen Woods     | PIC Development ID:<br>NC003000059    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>21                                        | Pre-RAD Unit Type:<br>Family          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$19,816                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                     | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Two Bedroom                                               | 11                                    | 11                                     | 0                                                                                                                                     |
| Three Bedroom                                             | 10                                    | 10                                     | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 21                                    | 21                                     | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                   | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 21                                    |                                        |                                                                                                                                       |

|                                                           |                                                                                                                 |                                        |                                                                                                                                       |
|-----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Boulevard Seniors  | PIC Development ID:<br>NC003000060                                                                              | Conversion type:<br>PBV                | Transfer of Assistance:<br>20 units                                                                                                   |
| Total Units:<br>70                                        | Pre-RAD Unit Type:<br>Elderly                                                                                   | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$45,672                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                           | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                               | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 70                                                                                                              | 90                                     | 20                                                                                                                                    |
| Two Bedroom                                               | 0                                                                                                               | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                             | 0                                                                                                               | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                                                                                               | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                               | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                               | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 70                                                                                                              | 90                                     | 20                                                                                                                                    |
| If performing a Transfer of Assistance:                   | The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary. |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 90                                                                                                              |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                                             |                                        |                                                                                                                                       |
|-----------------------------------------------------------|-------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Hall House         | PIC Development ID:<br>NC003000061                          | Conversion type:<br>PBV                | Transfer of Assistance:<br>191                                                                                                        |
| Total Units:<br>191                                       | Pre-RAD Unit Type:<br>Senior                                | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$233,435                                                                                     |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                       | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 60                                                          | 0                                      | -60                                                                                                                                   |
| One Bedroom                                               | 130                                                         | 0                                      | -130                                                                                                                                  |
| Two Bedroom                                               | 1                                                           | 0                                      | -1                                                                                                                                    |
| Three Bedroom                                             | 0                                                           | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                              | 0                                                           | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                           | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                           | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 191                                                         | 0                                      | -191                                                                                                                                  |
| If performing a Transfer of Assistance:                   | Hall House is currently vacant, so there is no waiting list |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 0                                                           |                                        |                                                                                                                                       |

|                                                                  |                                                                                                                |                                        |                                                                                                                                       |
|------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Claremont/Victoria Square | PIC Development ID:<br>NC003000062                                                                             | Conversion type:<br>PBV                | Transfer of Assistance:<br>1 unit from Victoria Square                                                                                |
| Total Units:<br>82                                               | Pre-RAD Unit Type:<br>Family                                                                                   | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$72,191                                                                                      |
| <b>Bedroom Type</b>                                              | <b>Number of Units Pre-Conversion</b>                                                                          | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| One Bedroom                                                      | 14                                                                                                             | 14                                     | 0                                                                                                                                     |
| Two Bedroom                                                      | 34                                                                                                             | 34                                     | 0                                                                                                                                     |
| Three Bedroom                                                    | 25                                                                                                             | 24                                     | -1                                                                                                                                    |
| Four Bedroom                                                     | 9                                                                                                              | 9                                      | 0                                                                                                                                     |
| Five Bedroom                                                     | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                      | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Total Units                                                      | 82                                                                                                             | 81                                     | -1                                                                                                                                    |
| If performing a Transfer of Assistance:                          | The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:        | 81                                                                                                             |                                        |                                                                                                                                       |

Appendix H

|                                                           |                                                                                                                |                                        |                                                                                                                                       |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Boulevard Phase II | PIC Development ID:<br>NC003000063                                                                             | Conversion type:<br>PBV                | Transfer of Assistance:<br>8 units                                                                                                    |
| Total Units:<br>23                                        | Pre-RAD Unit Type:<br>Family                                                                                   | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$21,320                                                                                      |
| <b>Bedroom Type</b>                                       | <b>Number of Units Pre-Conversion</b>                                                                          | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                         | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| One Bedroom                                               | 4                                                                                                              | 7                                      | 3                                                                                                                                     |
| Two Bedroom                                               | 11                                                                                                             | 15                                     | 4                                                                                                                                     |
| Three Bedroom                                             | 8                                                                                                              | 9                                      | 1                                                                                                                                     |
| Four Bedroom                                              | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                              | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                               | 0                                                                                                              | 0                                      | 0                                                                                                                                     |
| Total Units                                               | 23                                                                                                             | 31                                     | 8                                                                                                                                     |
| If performing a Transfer of Assistance:                   | The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services: | 31                                                                                                             |                                        |                                                                                                                                       |

|                                                             |                                       |                                        |                                                                                                                                       |
|-------------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Strawn Apartments II | PIC Development ID:<br>NC003000064    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>170                                         | Pre-RAD Unit Type:<br>Senior          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$178,054                                                                                     |
| <b>Bedroom Type</b>                                         | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                           | 120                                   | 120                                    | 0                                                                                                                                     |
| One Bedroom                                                 | 50                                    | 50                                     | 0                                                                                                                                     |
| Two Bedroom                                                 | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                 | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                                 | 170                                   | 170                                    | 170                                                                                                                                   |
| If performing a Transfer of Assistance:                     | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:   | 170                                   |                                        |                                                                                                                                       |

Appendix H

|                                                             |                                       |                                        |                                                                                                                                       |
|-------------------------------------------------------------|---------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br>Parktowne Terrace II | PIC Development ID:<br>NC003000065    | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br>163                                         | Pre-RAD Unit Type:<br>Senior          | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$172,099                                                                                     |
| <b>Bedroom Type</b>                                         | <b>Number of Units Pre-Conversion</b> | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                           | 130                                   | 130                                    | 0                                                                                                                                     |
| One Bedroom                                                 | 33                                    | 33                                     | 0                                                                                                                                     |
| Two Bedroom                                                 | 0                                     | 0                                      | 0                                                                                                                                     |
| Three Bedroom                                               | 0                                     | 0                                      | 0                                                                                                                                     |
| Four Bedroom                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| Five Bedroom                                                | 0                                     | 0                                      | 0                                                                                                                                     |
| Six Bedroom                                                 | 0                                     | 0                                      | 0                                                                                                                                     |
| Total Units                                                 | 163                                   | 163                                    | 0                                                                                                                                     |
| If performing a Transfer of Assistance:                     | N/A                                   |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:   | 163                                   |                                        |                                                                                                                                       |

|                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
|------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Name of Public Housing Development:<br><a href="#">Strawn Cottages</a> | PIC Development ID:<br><a href="#">NC003000058</a>                                                                                                                                                                                                                                                                                                                                                        | Conversion type:<br>PBV                | Transfer of Assistance:<br>None                                                                                                       |
| Total Units:<br><u>11</u>                                              | Pre-RAD Unit Type:<br><u>Family</u>                                                                                                                                                                                                                                                                                                                                                                       | Post-RAD Unit Type if different:       | Capital Fund allocation of Development: \$172,099                                                                                     |
| <b>Bedroom Type</b>                                                    | <b>Number of Units Pre-Conversion</b>                                                                                                                                                                                                                                                                                                                                                                     | <b>Number of Units Post-Conversion</b> | <b>Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)</b> |
| Studio/Efficiency                                                      |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
| One Bedroom                                                            | <u>11</u>                                                                                                                                                                                                                                                                                                                                                                                                 | <u>11</u>                              | <u>0</u>                                                                                                                              |
| Two Bedroom                                                            |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
| Three Bedroom                                                          |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
| Four Bedroom                                                           |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
| Five Bedroom                                                           |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
| Six Bedroom                                                            |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |
| Total Units                                                            | <u>11</u>                                                                                                                                                                                                                                                                                                                                                                                                 | <u>11</u>                              | <u>0</u>                                                                                                                              |
| If performing a Transfer of Assistance:                                | <u>Subsidy will be transferred to a new development in Charlotte that INLIVIAN's development instrumentality, Horizon Development Partners, Inc. is developing with a private partner. HDP is the controlling member in the partnership and has the right of first refusal to purchase the property and all member interests after the initial 15-year compliance period for tax credits has expired.</u> |                                        |                                                                                                                                       |
| # of Elderly, Disabled, or Receiving Supportive Services:              |                                                                                                                                                                                                                                                                                                                                                                                                           |                                        |                                                                                                                                       |



**Total to convert under RAD: 3,399 Physical Units/3,277 Occupied Units**

- A. INLIVIAN proposes a transfer of assistance for units at Hall House to Woodlawn, Prosperity Creek and Steele Creek.
  - B. INLIVIAN proposes a transfer of assistance for current special use units at Southside Homes, Arbor Glen, Charlottetown Terrace, and Victoria Square to dwelling units at Boulevard Seniors and Boulevard Phase II.
  - C. Upon conversion there will be changes in the policies that govern eligibility, admission, selection, and occupancy of units at the project sites after they have been converted. INLIVIAN will follow the HCV Administrative Plan and approved Owner Tenant Selection plan for resident selection.
  - D. INLIVIAN is currently compliant with all fair housing and civil rights requirements and is not under a Voluntary Compliance Agreement.
  - E. INLIVIAN will be requesting approval from HUD for a Transfer of Assistance of RAD PBV at formerly converted public housing properties, in order to redevelop underutilized sites to increase the total number of units to develop the site as mixed-income housing versus the traditional 100% extremely low income. Additional housing is needed in the portfolio to meet community demand in one of the fastest growing cities in the nation.
- D.

**RAD PBV PROJECT SELECTION AND PROJECT CAP**

**PBV Project Selection**

**Maximum Amount of PBV Assistance**

Covered projects do not count against the maximum amount of assistance a PHA may utilize for the PBV program.

## Appendix H

### **Cap on Number of PBV Units in each Project**

Fifty percent (50%) of the units in each project may receive PBV assistance. An assisted household cannot be involuntarily displaced as a result of this provision.

INLIVIAN will provide Housing Choice Voucher Project-based assistance for up to 100% of units at properties owned directly or indirectly by the Agency, subject to HUD's requirements regarding subsidy layering.

An owner may still project-base 100 percent of the units provided at least 50 percent of the units at the project qualify for the exceptions for elderly, disabled, or families receiving supportive services, or are within single-family properties or in accordance with INLIVIAN MTW initiatives.

Families living in units subject to a proposed RAD conversion must be given the option to receive supportive services. If such services are declined by the household, the unit shall remain under the HAP contract, the household shall not be terminated from the PBV program, and the decision to decline an offer to receive supportive services shall not represent a ground for lease termination. Once the initial household residing in the excepted unit under RAD vacates such unit, all MTW / PBV program requirements related to the required receipt of supportive services shall apply.

### **PBV CONTRACT TERMS AND CONTRACT RENTS**

#### **Length of Contract**

Covered projects shall have an initial HAP term of at least 15 years and up to 20 years upon request of the PHA and with approval by the agency administering the vouchers.

#### **Mandatory Contract Renewal**

By statute, upon contract expiration, the agency administering the vouchers shall offer, and the PHA shall accept, renewal of the contract subject to the terms and conditions applicable at the time of renewal and the availability of appropriations each year for such renewal.

In the event that the HAP Contract is removed due to breach, non-compliance or insufficiency of Appropriations, for all units previously covered under the HAP Contract, new tenants must have incomes at or below 80 percent of the area median income at the time of admission and rents may not exceed 30% of 80% of median income for an appropriate size unit for the remainder of the term of the RAD Use Agreement.

#### **Initial Contract Rents**

Initial PBV contract rents are subject to the statutory and regulatory PBV requirements governing contract rents. Initial contract rents cannot exceed the lower of (a) the reasonable rent; (b) an amount determined by the PHA, not to exceed 120 percent of the applicable FMR (or

## Appendix H

applicable exception payment standard), minus any utility allowance; or (c) the rent requested by the owner.

PHAs may adjust subsidy (and contract rents) across multiple projects. MTW agencies may use their MTW block grant funds to set their initial contract rents, subject to applicable program caps. HUD refers to this as “bundled” rents, and is permissible when a PHA submits applications for two or more projects. There is no limit to the number of projects that a PHA may bundle.

### **Adjusting Contract Rents**

Contract rents will be adjusted annually by HUD’s Operating Cost Adjustment Factor (“OCAF”) at each anniversary of the HAP Contract, subject to the availability of appropriations for each year of the contract term. The rent to owner may at no time exceed the reasonable rent charged for comparable unassisted units in private market, as determined by the Contract Administrator. However, the rent to owner shall not be reduced below the initial rent to owner for dwelling units under the initial HAP Contract. MTW agencies may not alter this requirement.

## **Resident Rights, Participation, Waiting List and Grievance Procedures**

### **Section 1.6. C. PBV Resident Rights and Participation**

#### **1. No Re-screening of Tenant upon Conversion**

Current households are not subject to rescreening, income eligibility, or income targeting provisions. Current households will be subject to any ongoing eligibility requirements for actions that occur during tenancy.

#### **2. Right to Return**

Any residents which need to be temporarily relocated to facilitate rehabilitation or construction will have a right to return to an assisted unit at the development once rehabilitation or construction is completed. Where the transfer of assistance to a new site is warranted and approved residents of the converting development will have the right to reside in an assisted unit at the new site once rehabilitation or construction is complete. Households will need to meet eligibility requirements at the time of admission. Residents of a development undergoing conversion of assistance may voluntarily accept a HA or Owner’s offer to permanently relocate to another assisted unit, and thereby waive their right to return to the development after rehabilitation or construction is completed

#### **3. Renewal of Lease**

## Appendix H

The HA must renew all leases upon lease expiration, unless cause exists. This provision must be incorporated by the PBV owner into the tenant lease or tenancy addendum, as appropriate.

### **4. Phase-in of Tenant Rent Increases**

INLIVIAN will continue to utilize the Rent Reform initiative to calculate total tenant payment, so tenant rent increases are not anticipated. If a tenant's monthly rent increases by more than the greater of 10 percent or \$25 purely as a result of conversion, the rent increase will be phased in over 3 years.

Three Year Phase-in:

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

### **5. Public Housing FSS, ROSS, and Jobs Plus Participants**

Current PH FSS participants will continue to be eligible for FSS once their housing is converted under RAD, and PHAs will be allowed to use any PH FSS funds granted previously or pursuant to the FY 2013 PH FSS NOFA, to serve those FSS participants who live in units converted by RAD and who will as a result be moving to the HCV FSS program. A PHA must convert the PH FSS program participants at the covered project to their HCV FSS program.

Residents who were converted from the PH FSS program to the HCV FSS program through RAD may be terminated from the HCV FSS program or have HCV assistance withheld due to the participant's failure to comply with the contract of participation. RAD-PBV participants who exit from the HCV Traditional FSS program and occupied a RAD-PBV unit at the time of conversion may be required to terminate their assistance upon exiting the program.

Current ROSS-SC grantees will be able to finish out their current ROSS-SC grants once their housing is converted under RAD. However, once the property is converted, it will no longer be eligible to be counted towards the unit count for future public housing ROSS-SC grants.

The Jobs Plus target project(s) under RAD will be able to finish out their Jobs Plus period of performance at the site. Existing grant requirements, including but not limited to Jobs Plus Earned Income Disregard will continue to be implemented.

## 6. Resident Participation and Funding

Residents of covered projects converting assistance to PBVs will have the right to establish and operate a resident organization for the purpose of addressing issues related to their living environment and be eligible for resident participation funding contingent upon funding availability.

## 7. Resident's Procedural Rights

- A. **Lease Termination.** In addition to the regulations at 24 CFR § 983.257, related to owner termination of tenancy and eviction, the termination procedure for RAD conversions to PBV will require that HAs provide adequate written notice of termination of the lease. In a case where the family has committed such an action or failure to act, the Project Owner may seek to evict the family and will do so by terminating the family's lease according to the following procedures.
- B. **Notice of lease termination.** Before terminating a tenant's lease, the Project Owner must issue a written notice of lease termination to the tenant which shall not be less than:
- i. A reasonable period of time, but not to exceed than thirty (30) days:
    - a. If the health or safety of other tenants, Project Owner or HA employees, or persons residing in the immediate vicinity of the premises is threatened; or
    - b. In the event of any drug-related or violent criminal activity or felony conviction;
  - ii. Ten (10) days in the case of nonpayment of rent;
  - iii. Thirty (30) days in every other case, except that if a state or local law provides for a shorter period of time, such shorter period shall apply;
  - iv. Any notice of lease termination must contain the following information.
    - a. The reasons for the lease termination with enough specificity to permit the tenant to prepare a defense;
    - b. A statement of the tenant's right to request an informal grievance hearing from the Project Owner within ten (10) business days of the tenant's receipt of the notice of lease termination;
    - c. The opportunity to examine before the informal grievance hearing any relevant documents, records, or regulations, in the Project Owner's possession, including the tenant file, directly relating to the matter. The tenant shall be allowed to copy any such document at the tenant's expense. If the Project Owner does not make the document available for examination upon request by the resident, the Project Owner may not rely on such document at the informal grievance hearing.
    - d. The rights of tenants pursuant to the requirements of 24 CFR Part 5, Subpart L, involving protections for victims of domestic violence, dating violence, sexual assault, or stalking; and
    - e. The right of tenants to request a reasonable accommodation based on a disability, in accordance with 24 CFR Part 8.

C. **Grievance Hearing.** In addition to reasons that require an opportunity for an informal hearing given in 24 CFR § 982.555(a)(1)(i)-(vi),<sup>31</sup> an opportunity for an informal hearing must be given to residents for any dispute that a resident may have with respect to a HA (as owner) action in accordance with the individual's lease or the contract administrator in accordance with RAD PBV requirements that adversely affect the resident's rights, obligations, welfare, or status.

- i. For any hearing required under 24 CFR § 982.555(a)(1)(i)-(vi), the contract administrator will perform the hearing, as is outlined in Chapter 16 of the Housing Choice Voucher Administrative Plan.
- ii. For any additional hearings required under RAD, the HA (as owner) will perform the hearing.
- iii. There is no right to an informal hearing for class grievances or to disputes between residents not involving the Project Owner or contract administrator.
- iv. The Project Owner gives residents notice of their ability to request an informal hearing as outlined in 24 CFR § 982.555 (c) (1) for informal hearings that will address circumstances that fall outside of the scope of 24 CFR § 982.555 (a) (1) (i)-(vi).

D. **Informal Hearing.** The Project Owner provides opportunity for an informal hearing before an eviction as described below:

- a. Request for informal grievance hearing. The tenant shall submit a written request for a hearing to the Project Owner within ten (10) business days of receipt of notice of the adverse action taken by the Project Owner. The written request shall specify:
  - i. The reasons for the grievance; and
  - ii. The action or relief sought.
- b. Selection of Hearing Officer or Hearing Panel.
  - i. An informal grievance hearing shall be conducted by an impartial person or persons appointed by the Project Owner other than a person who made or approved the action under review or a subordinate of such person.
- c. Scheduling of hearings. Once the tenant properly requests the hearing, the hearing shall be scheduled by the hearing officer or hearing panel promptly for a time and place reasonably convenient to both the tenant and the Project Owner. A written notification specifying the time, place and the procedures governing the informal hearing shall be issued to the tenant at least five (5) calendar days before the informal hearing.
- d. **Hearing Requirements**
  - i. The tenant shall be afforded a fair hearing, which shall include:
    - a) The opportunity to examine before the informal grievance hearing any relevant documents, records, or regulations, in the Project Owner's possession, including the tenant file, directly relating to the matter. The tenant shall be allowed to copy any such document at the tenant's expense. If the Project Owner does not make the document available for examination upon request by the resident, the Project Owner may not rely on such document at the informal grievance hearing.
    - b) The right to be represented by counsel or other person chosen as the tenant's representative, and to have such person make statements on the tenant's behalf;

## Appendix H

- c) The right to a private hearing;
  - d) The right to present evidence and arguments in support of the tenant's complaint, to controvert evidence relied on by the Project Owner, and to confront and cross-examine all witnesses upon whose testimony or information the Project Owner relies; and
  - e) A decision based solely and exclusively upon the facts presented at the hearing.
- ii. The hearing officer or hearing panel may render a decision without proceeding with the hearing if the hearing officer or hearing panel determines that the issue has been previously decided in another proceeding.
  - iii. If the tenant fails to appear at a scheduled hearing, the hearing officer or hearing panel may make a determination that the party has waived his right to a hearing. Both the tenant and the Project Owner shall be notified of the determination by the hearing officer or hearing panel: *Provided*, That a determination that the tenant has waived his right to a grievance hearing shall not constitute a waiver of any right the tenant may have to contest the disposition of the grievance in an appropriate judicial proceeding.
  - iv. At the hearing, the tenant must first make a showing of an entitlement to the relief sought and thereafter the Project Owner must sustain the burden of justifying the Project Owner's action or failure to act against which the complaint is directed.
  - v. The hearing shall be conducted informally by the hearing officer or hearing panel and oral or documentary evidence pertinent to the facts and issues raised by the complaint may be received without regard to admissibility under the rules of evidence applicable to judicial proceedings. The hearing officer or hearing panel shall require the Project Owner, the tenant, counsel and other participants to conduct themselves in an orderly fashion. Failure to comply with the directions of the hearing officer or hearing panel to obtain order may result in exclusion from the proceedings or in a decision adverse to the interests of the disorderly party and granting or denial of the relief sought, as appropriate.

### **8. Establishment of Waiting List**

In establishing the waiting list for the converted project, the PHA shall utilize the project-specific waiting list that existed at the time of conversion. In addition, the waiting list must be maintained in accordance with PBV program requirements.

### **9. Choice-Mobility**

Under the RAD-PBV program, converting residents are eligible to the right to move with a tenant based rental assistance voucher after 12 months of occupancy after conversion. (24CFR 983.260). Once the initial converting resident vacates, all MTW/ PBV waivers/requirements related to choice mobility shall apply. The tenant based voucher comes from an existing voucher supply from the PHA and is subject to availability. The PHA will set aside 75% of turnover vouchers to be utilized for converting residents. If a tenant-based rental assistance voucher is unavailable, the family will be placed on a waiting list until such time that one becomes available.

**10. Agreement Waiver**

For public housing conversions to PBV, there will be no Agreement to Enter into a Housing Assistance Payments (AHAP) contract. Therefore, all regulatory references to the Agreement (AHAP), including regulations under 24 CFR Part 983 Subpart D are waived.

**11. Inspections**

The PBV requirements related to inspection shall apply to all RAD PBV units.

**12. When Total Tenant Payment Exceeds Gross Rent (over subsidy)**

When total tenant payment (TTP) for families living in the Covering Project prior to conversion, exceeds the Gross Rent of the unit, the unit for such families will remain under the HAP Contract. The rent to the owner for the unit will be (a) the family's TTP, less the Utility Allowance, or (b) the maximum LIHTC rent, if applicable. The unit will be considered part of the HAP contract and will remain eligible to receive future assistance should the resident's income decrease. In addition, the regulation requiring termination of assistance if a household does not receive subsidy for 180 days is also waived. Following conversion, all MTW / PBV over subsidy regulations will apply.

**13. Under-occupied units**

If a family is in an under-occupied unit at the time of conversion, the family may remain in this unit until an appropriate sized unit becomes available in the covered project, but will be subject to move to an appropriate size unit once one becomes available. . Following conversion, all MTW / PBV regulations will apply.

**PBV: Other Miscellaneous Provisions**

- 1. Access to Records, Including Requests for Information Related to Evaluation of Demonstration.** PHAs must agree to any reasonable HUD request for data to support program evaluation, including but not limited to project financial statements, operating data, Choice-Mobility utilization, and rehabilitation work. Please see Appendix IV for reporting units in Form HUD-50058.
- 2. Additional Monitoring Requirement.** The PHA's Board must approve the operating budget for the covered project annually in accordance with HUD requirements.
- 3. Davis-Bacon Act and Section 3 of the Housing and Urban Development Act of 1968 (Section 3).** Under existing PBV program rules, projects that qualify as "existing housing" under 24 CFR § 983.52(a) are not subject to Davis-Bacon (prevailing wages, the



## Appendix H

4. Contract Work Hours and Safety Standards Act, and other related regulations, rules, and requirements) or Section 3 (24 CFR Part 135). However, the Davis-Bacon Act and Section 3 shall apply to all initial repairs that are identified in the Financing Plan to the extent that such repairs qualify as construction or rehabilitation, regardless of whether the project qualifies as “existing housing.” Developmental requirements under 24 CFR §983.154 and fair housing provisions under 24 CFR § 983.152(c)(vi) continue to apply.
5. **Mandatory Insurance Coverage.** The project shall maintain at all times commercially available property and liability insurance to protect the project from financial loss and, to the extent insurance proceeds permit, promptly restore, reconstruct, and/or repair any damaged or destroyed property of a project, except with the written approval of HUD to the contrary.
6. **Future Refinancing.** Owners must receive HUD approval for any refinancing or restructuring of permanent debt within the HAP contract term to ensure the financing is consistent with long-term preservation. (Current lenders and investors are also likely to require review and approval of refinancing of the primary permanent debt.)
7. **Administrative Fees for Public Housing Conversions.** For the initial Calendar Year in which a project’s assistance has been converted, RAD PBV projects will be funded with public housing money. Since the public housing funding will not have been transferred to the TBRA account and since this funding is not section 8 assistance the annual contributions contract (ACC) between the PHA and HUD will cover the project units, but be for zero dollars. For this transition period, the ACC will primarily serve as the basis for covering the units and requiring PHA compliance with HUD requirements, but it will not be (as it is in the regular PBV program) the funding vehicle for the PBV RAD vouchers. Given this, and given the fact that PHAs will be receiving full public housing funding for the PBV units during this transition period, PHAs will not receive ongoing section 8 administrative fee funding during this time.  
<sup>32</sup> For PBV conversions that are not FHA-insured, a future HUD notice will describe project financial data that may be required to be submitted by a PBV owner for purposes of the evaluation, given that PBV projects do not submit annual financial statements to HUD/REAC.

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

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

.....

**Site Selection and Neighborhood Standards Review**

INLIVIAN has analyzed all currently known replacement sites for those RAD conversions that involve transfer of assistance. All proposed sites meet the current MTW Site and Neighborhood Standards as defined in INLIVIAN's MTW Agreement.

.....

**Relocation Plans**

INLIVIAN anticipates relocation at only one community, Tall Oaks, which is currently under redevelopment. However, should future renovation or redevelopment plans require relocation, Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 will be followed as applicable. Households will need to meet eligibility requirements at the time of admission.

.....

**Significant Amendment Definition**

As part of the Rental Assistance Demonstration (RAD), INLIVIAN is redefining the definition of a substantial deviation from the MTW Plan to exclude the following RAD-specific items:

- a. Changes to the Capital Fund Budget produced as a result of each approved RAD Conversion, regardless of whether the proposed conversion will include use of additional Capital Funds;
- b. Changes to the construction and rehabilitation plan for each approved RAD conversion;
- c. Decisions or changes related to the financing structures for each approved RAD conversion including decisions to allocate PHA financial resources as a source of funds to support the RAD conversion initiatives; and
- d. Decisions to apply MTW programmatic flexibility to post-conversion RAD developments.

## Appendix I

### Lobbying Disclosures

Upon completion of the public review and comment process, the required form will be included in the final version of the plan to be submitted for HUD approval.

DRAFT