



Tuesday July 9, 2024
Housing Authority of the
City of Winston-Salem
Board of Commissioners
12:00 Noon

Housing Authority of Winston Salem
Board of Commissioners

LOCATION: Electronic

July 9, 2024
12:00 noon



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Board of Commissioners
12:00 Noon

BOARD OF COMMISSIONERS MEETING AGENDA
July 9, 2024
12:00 P.M.

1. Call to Order – Pledge of Allegiance
2. Roll Call
3. Review and Approval of Agenda (July 9, 2024)
4. Review and Approval of Minutes (June 11, 2024)
5. Management Reports
 - Executive Director Report
 - Operations Report
 - Housing Choice Voucher
 - Public Housing
 - Nonfederal Housing
 - Drayton Pines, Inc.
 - Plaza
6. Resolutions
 - **Resolution No. 2247** – Authorizing Approval of Financial Statements (May 2024)
 - **Resolution No. 2248** – Authorizing Demolition and Disposition of Cleveland Avenue Homes
 - **Resolution No. 2249** – Adopting the Revised Admission and Continued Occupancy Policy (ACOP); the Revised HCV Administrative Plan (Admin Plan); and the 2024-2025 Annual Plan
 - **Resolution No. 2250** – Authorizing Acquisition Membership Interest in HHG III, LLC from Raymond James Affordable Housing Fund 6 L.L.C.
7. Board Comments
8. Adjournment



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Board Member Attendance:

- Chairman Andrew Perkins – Present
- Vice Chair Betsy Annese- Present
- Commissioner Williams Rose- Present
- Commissioner Alfred Adams- Present (via Zoom)
- Commissioner Art Gibel- Present
- Commissioner Felicia Brinson- Absent
- Commissioner Arthur Dark – Absent
- Commissioner Kathy Stitts – Absent
- Commissioner Vivian Perez Chandler – Present (via Zoom)

Staff Presenting:

- Kevin Cheshire, ED and General Counsel
- Nancy Thomas, VP of Finance, CFO
- Kelly Church, VP of Operations, COO
- Dee Dee Baldwin, Director of Public Housing Operations
- Lisa Matthews, Building Manager and Assistant Director

1. CALL TO ORDER

- Board meeting called to order by Chair Perkins at 12:00 p.m.

2. ROLL CALL

- Roll was taken and there was a quorum

3. REVIEW AND APPROVAL OF THE AGENDA

- Consideration to approve the Agenda (June 11, 2024)
Motion: Commissioner Gibel
Second: Commissioner Rose

Unanimous.

4. REVIEW AND APPROVAL OF MINUTES

- Consideration to approve of Minutes (May 14, 2024)
Motion: Commissioner Gibel
Second: Commissioner Annese

Unanimous.

5. MANAGEMENT REPORTS

- Executive Director Report
(Cheshire) Thank you Mr. Chairman. I will run us through the written report that's on the screen and included in the packet. Before I get to that too, let me also just mention that the NSPIRE inspections, HUD has, of course, changed the approach to inspections. They're using a different inspection structure. We've been through one. Several of those

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got rescheduled, because HUD had an issue with its software part. So, HUD rolls out this massive change and then immediately puts the brakes on. So, we do still have a lot of NSPIRE inspections coming up. We use a third-party to go and do a pre-inspection. So once those deficiencies are identified, we then go and work through those work orders and try to get those corrected, ahead of the NSPIRE. So David and his team are working through those and I just wanted you to know. That's a big deal for us right now, operationally. It's not normally something we hit on, but I just wanted you all to know that that was going on. **(Perkins)** Thank you. **(Cheshire)** Yes sir. Crystal Towers is priority number one, as it has been for, at least, a year and a half now. Phase 1, we just leave up there to note that that was part of the plan. We rolled out, a year and a half ago, with Phase 1, which is to say, the laundry and lobby renovation has been completed. Phase 2, we are in the midst of. That is a 2-car, full system elevator replacement. Car 1 is placed in service. That was placed in service in May and Car 2, a modernization is in progress. Excuse me, Car 1 was placed in service in April. Car 2 modernization is in progress. That began in May, and we are anticipating an August completion date. Now, they had originally rolled out a more aggressive schedule, which I thought was optimistic. It looks now like we are tracking more on the 16 week schedule, rather than the original 8 weeks schedule. But we do still anticipate that August completion. Phase 3 is an assessment, scope and cost estimate. Bad news here. And I'm going to respectfully request you all's collective assistance. We only received one response to the bid for the assessment. Which is to say, putting together a scope of work, identifying the deficiencies, putting together some renderings and providing a cost estimate. The only response we received was from this architecture group called Stogner, and they really, primarily, only focus on housing authorities. Which is fine, but I'm really looking for some more creative approaches. Some design teams that don't, necessarily, focus exclusively on, sort of, the HUD model, to really see what we can do to make this sustainable and modernize the building for the long term. So if any of you all have relationships with architects, engineers, designers, and could circulate that RFP, we have put it back out for rebid. So we are accepting responses. **(Perkins)** Yeah. I got one from the guy I recommended to you, Dan Field, but he declined to submit because he didn't feel it was in his wheel house. So I'll get back with Victor Barnes and see if he will respond to it. **(Gibel)** Was the bid reasonable? **(Cheshire)** I don't know that we opened it, since it was only one. **(Gibel)** Okay. **(Cheshire)** Yeah. Item D there, is Supportive Services. That was not included in the original 3-phase approach, but it is something that's obviously important and something that we've discussed about, a lot. Tee-Tee and Darlie, which is to say, the Engagement Team, have coordinated multiple on-site providers. I have a calendar showing when they are out there. Now, what I would like to see, is more consistency and I would like to make sure that the providers that are on site, match the needs of the tenants of the building. So we're working through that. The grant application that I mentioned last month, was submitted. It has been retrieved. So, we're looking forward to getting a response from that. I do not know when we will hear back, but that is for multiple full-time equivalents. Which is to say, multiple employees housed at Crystal Towers, providing case management services, day-in and day-out, 40 hours a

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week. So that would, obviously, be a real game changer if we were to receive that grant award. Item 2 is the King Building Relocation. We still anticipate that September move. Like with the NSPIRE, David and his team have been managing that project. They've done a really nice job. It's tracking on schedule. So, good news there. Loewy Building buyers understand where we are. We have exercised our option to extend the closing 60 days. So we're working through just formalizing that. The buyers have no problem with that. They understood that's what we were going to be doing and we're progressing, with respect to move out here at the building. So some tenants have started moving out. The building is certainly not empty, but we're getting there. So, no issues right now and none that are foreseen, in the near future. Happy Hill: Phase 1 is the Habitat for Humanity phase. Thirteen lots that we deeded over to Habitat for Humanity. Five homes completed and they were dedicated last month. It was a great ceremony. I wasn't able to make it. Shane Nixon brought remarks on behalf of the Housing Authority. I really think the world of George Redd, who is the Executive Director of Habitat for Humanity. He did a really nice job. The contactors who are out there volunteering their time, really well done. The houses are amazing. I'll mention this, just for folks who may be interested and in town, and we're not able to make the dedication. There's an open house out there on Thursday, 4 to 8 o'clock. I think there's going to be a silent auction and an opportunity to walk through the interior of one of those homes. So really, really quick movement there on Phase 1. **(Perkins)** There was an excellent TV coverage, as well, on those five houses being done. Tremendous coverage. Great coverage! **(Rose)** What time did you say that was? **(Cheshire)** It's from 4 to 8. It's floating. It's on Thursday. This Thursday. Phase 2, not so much, unfortunately. I think this has been my update for the last 3 months. We really moved quickly with that development team. And they're great. They're sophisticated. They have broadened the community. I love who we've got working with us, but these legacy deed restrictions, they have really presented...I don't want to say they presented a problem, we just still don't yet know, exactly what we're dealing with. And, there were some strange things when they started looking at the title. So, we've got some smart attorneys who are trying to work through that. And the truth of the matter, I suspect, is that because we ran into a few things that slowed it down, they just moved on. And I don't mean moved on forever, I mean that they just moved things up in their priority list, because they could go ahead and start building. Whereas, there's soft side things that we still need to work through on our end. So, I'll keep you updated. But, I suspect when we clear this, we'll start seeing movement really, really quickly. Choice Neighborhoods: Phase I is, of course, the Brown School Lofts. Nothing to update there, other than the lease up is going really, really well. That's been great. I'm just going to keep that on there, even though we're sort of out of that, right? We're not managing those apartments. We're not responsible for leasing them up. We remain involved. We are a special member of the ownership entity group. So absolutely, we still play a role, ensuring compliance and ensuring the maintenance and management of that site. But it is being handled through a third-party. Phases II/III that is still being reported as a consolidated phase. If the demolition...I would be absolutely shocked if it doesn't start in July. Absolutely shocked. We have signed what's known as the Additional Services

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Agreement, which is our contract with McCormack Baron, for the demolition and the site work, that's been signed. The money is there. So they are ready to issue a Notice to Proceed. And it's just going to be a matter of the demolition contractor getting that scheduled. But moving quickly there. No issues. The issue is the vertical construction. We do not have the funding to start the vertical construction. So, what we're going to end up with, is half of the community, more or less, demolished and sitting and half of the community still being managed, through a temporary management office. Because, the existing management office is being demolished, okay? So, our maintenance shop is going away. We're having to move in connexes and trailers and the management office is going away. We're having to utilize a vacant unit to operate our management. So that's not going to be great. Obviously, it's not intended to be the long-term plan. But, until we get this funding gap closed, we're sitting on that model. So we really need to close the funding gap. Phase II/III gap is \$7 million. I do not see a path forward for us to get \$7 million, between now and the end of the calendar year. So, I am proposing to disaggregate that consolidated phase and move back to the original Phase II, which is what I proposed to the County and I have sought \$2 million from the County. That public hearing was last night. We made a presentation last night, along with a lot of other folks. So we're waiting to hear back now. If we get that \$2 million from the County, I anticipate moving forward, really quickly, to closing and go ahead and getting vertical construction started on Phase II. If we don't get that money from the County, I anticipate that closing would be pushed back to 2025. We have, of course, applied for an additional \$2.5 million in supplemental funding from HUD. But, I do not anticipate HUD allowing us to utilize that \$2.5 million supplemental funding for Phase II. It's just too early, right? HUD is very concerned with us, sort of, frontloading everything. We've already front loaded a significant amount into Phase I to get that closed, and HUD is going to be very aware of not sort of spending everything you've got, so that subsequent phases are left high and dry. So, we will continue to work through that. That is a legitimate problem and concern, getting us to closing. Yes sir? **(Rose)** I was just going to ask about ARPA funds? I believe that...it's my understanding that, other communities, have been able to use ARPA funds for public housing, and I just wondered if uh, I believe Forsyth County has ARPA funds still left over. So... **(Cheshire)** So, the first part, you're absolutely correct. Other communities have used ARPA funds at various different levels. State ARPA funds, County ARPA funds and City ARPA funds. The City, of course, I think the City has \$9 million already in Phase II/III. So, the City's contributed a lot to the first three phases. The State has done a lot, with respect to tax credits. We do not have any State-level ARPA funds in this deal, and my understanding, is that there are some State level ARPA funds still available. And, I don't know, I just don't know the answer as far as the pots of money that the County still has left. I suspect you're right, because I have heard that as well. I just can't give you a definitive confirmation on that. But, I will say, that your original statement is 100% correct. The Treasury, made clear, that those ARPA funds can, in fact, be spent on affordable housing projects such as this one. I do think the funds are there, Commissioner Rose, is the upshot. It's just a matter of trying to prioritize this project because, there's certain other priorities, as well, that are also very [important]. The

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FEV meeting. Quarterly meeting is next month. I know that's always tough, right? Because it's the July meeting. We typically cancel the committee meetings, because it's typically following that July 4th week. You've got folks traveling. But we do have, that second week, the full Board meeting scheduled, as well as the FEV meeting. And I flag that to note, that the Willows Peake item may be coming before this Board. Excuse me, the FEV Board, in July. The Willows Peake item, is the item I've noted to both Committees. Willows Peake is a community over at Happy Hill. We have been the managing member of Willows Peake, so you all have been receiving reports on Willows Peake, but the investor member, which owns 99.9% is exiting. And that's very common, okay, in these tax credit deals. The compliance period has ended. They received the benefit of the tax credits. They are exiting and we, then, have the opportunity to step in for, relatively speaking, very, very little money. And so we're working through that. But it is possible we'll need to bring a FEV resolution in July. If it's not, it's not ready to go in July, we're not moving forward quickly enough to progress towards closing, we'll punt on it and we will probably need a special meeting. Because, I do anticipate needing to close sometime between July and the next scheduled quarterly meeting of FEV. The second item there, is just Lansing Ridge. I thought that was important to note and not wait until the FEV meeting. Lansing Ridge is owned by FEV. The Housing Authority has, of course, been involved, given that FEV was our subsidiary entity and we have devoted time and attention to try to get that community developed. But, Phase II has closed. Which is to say, those lots have been deeded over and we have received sales proceeds. And that is an MBE contractor and developer out there, building affordable home ownership plots, out there at Lansing Ridge. They're taking down those Phase I lots so quickly, that now, they have acquired Phase II, and they're building on those. So a real success story out there at Lansing Ridge. I'll certainly stop there, Mr. Chairman. I'd be happy to take any questions or comments. **(Perkins)** Are there any questions? Can we focus on a virtual meeting for the July meeting? **(Cheshire)** On a what? I'm sorry. **(Perkins)** Can we focus on a virtual meeting for the July meeting? A lot of us will be traveling. I know I'll be traveling. **(Cheshire)** Sure. **(Perkins)** If there are any documents that we need to sign, or anything, we can do that electronically. **(Cheshire)** We know how to track you down. We'll make that work. **(Perkins)** Thank you very much. **(Annese)** Do we have Committee meetings? There on the 2nd. **(Cheshire)** Yeah. So, the question on the table Mr. Chairman, is that previous week, the committee meetings, are we going to have them? **(Perkins)** I would suggest, not, unless we've got something really urgent to do. Because that gives you the option to be out. **(Cheshire)** Alright. So, Mr. Chairman, we will cancel the Committee meetings for July and we will hold the FEV and HAWS full Board meetings virtual. **(Perkins)** Yes sir. **(Cheshire)** And we will make sure the proper notices are issued. **(Perkins)** Thank you. **(Cheshire)** Yes sir.

- Operations Reports
 - Housing Choice Voucher

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(Church) Good afternoon. I'm going to take the Housing Choice Voucher report today. Romonda is out on vacation. The utilization rate, we are still sitting at 73%. So, that's not a change from last month. It's the same utilization rate. The number leased, we leased 25 vouchers for the month of April and 14 of them were removed from the program. We have the reasons listed on the second page. So I'll get to that when we finish this report. The average monthly HAP that's being paid out is \$793 per voucher. The applications, we have about 5,300 on our waiting list, and we still have about another 1,700 to input, that are from the April 2 - 4 opening of the waiting list, that were left via voice mail. So, those will be added to that number as soon as those are inputted. For the units that we had inspected by our HQS Inspectors, we inspected 480 units. 291 of those units passed on the first inspection and another 142 passed on the second inspection. The number of landlords participating in the program for the month of April, were 688 landlords. If you go to the second page Kimberly, that's page 39 in your packet, we have the list of reasons for the 14 move-outs for the month of April. We had one person that moved off the program, due to Zero HAP assistance; 9 that just turned in their voucher for tenant preference; 2 that moved out without notice; we had 1 eviction and 1 person without a passed inspection. You have any questions? **(Perkins)** No. Thank you very much. **(Church)** Okay. Thank you.

o Public Housing

(Baldwin) Good afternoon. I'll be doing the Public Housing Report for this month. **(Cheshire)** Dee Dee. I'm sorry to interrupt you, but would you mind letting the Board know your new title? I know they know you and they've heard from you before, but I'd like to acknowledge the change. **(Baldwin)** I'm the new Director of Property Management Operations. **(Perkins)** Congratulations. **(Baldwin)** Thank you. **(Perkins)** Excellent. **(Church)** Dee Dee was promoted into that position, on June 3rd. **(Cheshire)** She will be presenting Public Housing, moving forward, Mr. Chairman, unless she's out of the office. **(Baldwin)** The total occupancy rate for the month of April ended at 96.90% and that was with the approval of taking the units offline. So, Cleveland Avenue Homes, has a total 134 units. We had 23 move-ins for the month of April. We had 24 move-outs for the month of April. The total amount charged for the month of April was \$281,174. The total amount of money collected for the month of April was \$244,455. Other than the normal nonpayment of rent, filed in judicial court, we had one and, that was actually for Crystal Towers, and that was for disruptive behavior. Of course, he did appeal. So we're still in that process right now. Total work orders for the month of April was 1,104. They did close out a total of 923, which left a total of 181 work orders still open for the month. **(Perkins)** I think...I can't get over the fact of the maintenance work orders, of how quickly they have gotten done each month. So that's a tribute to the strong maintenance team we have. Thank you very much. **(Baldwin)** Thank you.

o Unsubsidized Housing

o Plaza Apartments and Drayton Pines



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(Matthews) I'll be doing the Unsubsidized Housing Report. It's on page 43. We have uh...had a 94% occupancy rate for the month of April. We had eight vacancies. We billed out \$70,102 and collected \$68,701. So we were about \$1,400 short. We did not have any lease terminations or evictions for the month. We had 15 incident reports. However, none of those involved our residents. At the beginning of the month, we got 27 work orders open. We created 80 more. There's 16 that were open at the end of the month, and one of those was an emergency work order. Anyone have any questions?
(Perkins) Thank you. **(Matthews)** Thank you.

6. RESOLUTIONS

Resolution No. 2245 – Authorizing Approval of Financial Statements (April 2024)

Motion: Commissioner Rose

Second: None needed

Unanimous.

(Perkins) I assume you have the financial report Nancy? **(Thomas)** Yes. The Balance Sheet is on page 48. Kimberly also has it pulled up. Just looking at the variances there, on our cash since the end of our fiscal year in September, has decreased about \$49,000. That's pretty close to where we were. We are about \$500,000 more than we had last year in cash, in April. Our Accounts Receivable-tenants are pretty flat. Prepaid expenses are higher than they were the end of September, and that's because we have some calendar year 24 insurance premiums in there, and about 9 months of YARDI support in there. Our Accounts Payable and Accrued Liabilities have decreased, about \$650,000, combined, since the end of the fiscal year. And while we are showing a net loss after depreciation of \$261,000, that is \$695,000 less of a loss than last April. That is primarily in areas of other income, and then our admin expenses being lower. The Income Statement is on page 51. The first line item under the operating income, the HUD Subsidy and Grants, we are showing over budget there, by a little over \$2 million. That is primarily in the housing assistance payments item. Those are the payments we get from HUD that we pass through to the landlords to subsidize our tenants' rents. Our Other Income is also over budget by \$680,000. That's uh...the largest part of that are the bond issuance fees that we've received. We've had two of those this year, so far, and we received \$331,000 in fees on that. In addition to that, we've had a PCard rebate, insurance claims, City grants are a little bit higher than budgeted, and then our PILOT funds. Our management fee revenue is under budget by about \$115,000. Those are fees from our Housing Choice Voucher program, so they do offset with the expenses also being under. Total income, overall, is 9.7% over budget. Our Admin Expenses are below budget, primarily in salaries and benefits. We'll see some of our admin expenses increase though, as we go through the rest of the fiscal year with our contracts that we have in place for our third-party services within our Housing Choice Voucher program and our IT. Our maintenance expense is still under budget. All areas are under budget right now. The largest would be in the salaries and benefits and are under about a \$195,000. So that

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savings will continue. Our materials and contracts are under by about another \$111,000. That could be made up as we go through the summer months and the rest of the fiscal year. Our Protective Services Expense continue to be under budget. Our General Expense, which is over budget by \$120,000, that's mostly in our bad debt or collection loss. Overall, our total operating expenses are 6.62% under budget. Our HAP, or our housing assistance payments are over budget about \$2.5 million. But again, that's...the offset of that is the HUD Subsidy and Grants, which are also over budget on the revenue side. So, net income before depreciation of \$741,000. That's \$1 million better than budget. Other Income contributes to that, and then all our expenses, except for our HAP expenses, are under budget. Salaries and benefits being \$447,000 of that. Our net income after depreciation, is a net loss of \$261,000 and as I mentioned, our decrease in cash is \$48/\$49,000, but that's, again, about a million better than we budgeted. If you look on page 56, at the Dashboard, on the right side, you can see there are four communities that are under budget. Sunrise and Crystal are under a little bit. Then Plaza and Drayton are also under budget. In Sunrise and Crystal, it's actually the subsidy that's a little bit under budget. And Plaza and Drayton, both of those, tenant rents are under budget and the maintenance expenses, particularly in the vacant unit prep at Plaza, and then the bad debt expense for both areas are over budget. But overall, we're in really good shape and I expect that to continue for the rest of the year. **(Perkins)** Thank you. How are we doing on our vacancy rate? **(Thomas)** For? **(Perkins)** How are we doing our vacancy rate for our team members that are vacant? **(Thomas)** For employees? **(Perkins)** Yes. **(Thomas)** I think we have about four in maintenance. Currently, we're using temps for those. We have a couple others in Housing Choice Voucher and Corporate. **(Perkins)** So you're running about 85...85% fail rate then? Is that right? **(Thomas)** Uh...we have about 90 positions and about six vacant. **(Perkins)** Thank you. Are there any other questions in reference to the finance report? If not, I assume we're getting a recommendation from you, Bill. **(Rose)** Yes sir. The Finance Committee heard the presentation last week at our committee meeting and, like you, I'm pleased to see the financials showing our revenues exceed expectations. Our expenses are lower than expected, but we're meeting all our obligations and the Board...the Committee recommended approval of the financials for April.

Resolution No. 2246 – Authorizing Approval of Subrecipient Agreement with City of Winston-Salem

Motion: Commissioner Gibel

Second: None needed

Unanimous.

(Perkins) Resolution number 2246. I assume, Kevin, you're taking that? **(Cheshire)** Yes sir. I'll brief that Mr. Chairman, and then, if there are detail level questions or anything that I get wrong, Katya is here to back me up or correct me. So, you've seen this before. Not this exact resolution or this exact agreement, but the way this works is, funds flow into us through this Choice Neighborhoods grant. We are the lead grantee. The City is the



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co-grantee. The City is responsible for administering the neighborhood dollars, right? Facade improvements, homeowners' improvements that type of thing. Anything that's not related to the actual housing development. Because the grants flow through us first, we've got to enter into a subrecipient agreement with the City which, essentially, spells out that the City is going to be held to the same obligations, because these funds are coming from the same source and are subject to the same grant agreement. And so, this particular subrecipient agreement, spells out how the City is going to use Choice Neighborhood grant funds for public art. And so, this is the resolution that we have, of course, attached the actual subrecipient agreement into...excuse me, as part of the Board packet, and it's substantially the same subrecipient agreement that we've signed previously with the City, with respect to other neighborhood funds that they have spent. **(Perkins)** Thank you. **(Cheshire)** Yes sir. **(Perkins)** Are there any questions and/or thoughts on this? If not, I would like to have a motion...**(Gibel)** Andy, this comes from Development Committee, so we...**(Perkins)** It's out of Development? So, all those in favor, please say aye.

7. BOARD COMMENTS

None

8. ADJOURNMENT

Motion to adjourn

Motion: Commissioner Gibel

Second: Commissioner Rose

Unanimous.

The June 11, 2024 meeting of the Board of Commissioners for the Housing Authority of the City of Winston Salem adjourned at 12:30 P.M.

Acknowledgment and Adoption of the June 11, 2024 HAWS Board Minutes:

Adopted: _____ (date)

Signed: _____ Executive Director (ED)

Executive Director Report

Executive Director Report (July 2024)

- 1) Crystal Towers
 - a) Phase 1 – Laundry and Lobby Renovation
 - i) Completed
 - b) Phase 2 – Elevator System Full Replacement
 - i) Car 1
 - (a) In Service
 - ii) Car 2
 - (1) Modernization In-Progress
 - (a) August Completion Anticipated
 - c) Phase 3 – Assessment, Scope, and Cost Estimate
 - i) Re-bid (one response received)
 - d) Supportive Services
 - i) Engagement Team Coordinating Multiple On-Site Providers
 - ii) Grant Application Submitted for On-Site Case Managers
- 2) King Building Relocation
 - a) Anticipate September Move
- 3) Happy Hill
 - a) Phase 1 – Habitat for Humanity
 - i) 13 Lots
 - ii) 5 Homes Completed
 - b) Phase 2 – Mixed Income Development on Unrestricted Parcels
 - i) Working Through Legacy Restrictions
- 4) Choice Neighborhoods
 - a) Phase I – Brown School Lofts
 - i) Completed
 - b) Phases II/III (Consolidated) – Cleveland Avenue Homes
 - i) Demolition – Anticipate July Start
 - ii) Funding Gap
 - (1) \$7 Million (\$2 Million Phase II)
 - (2) Second Round of Supplemental Funding (\$2.5MM)
 - (3) County Funding Request Denied

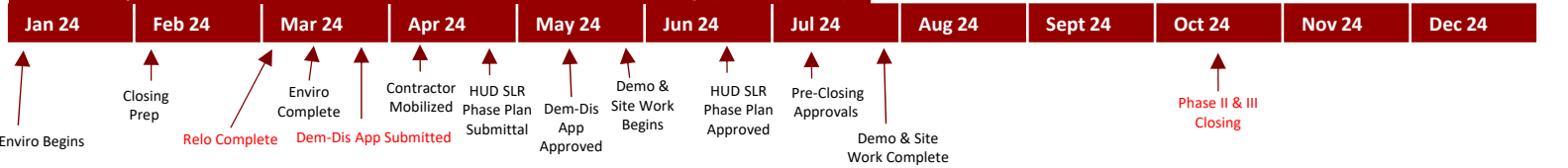
CNI Report

Choice Neighborhood Initiative Summary - June 2024

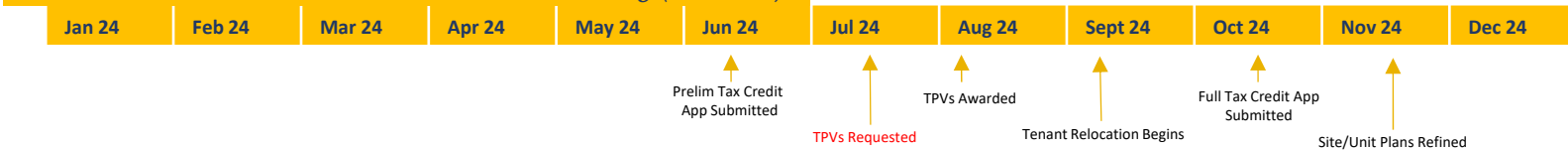
Phase I: The Lofts at Brown School – Multi-Family (81 Units)



Phase II/III: Cleveland Avenue Site – Multi-Family (120 Units)



Phase IV: Cleveland Avenue Site – Multi-Family (60 Units)



Phase V: Cleveland Avenue Site – Multi-Family (64 Units) & Senior Bldg (80 Units)



Brown School Lofts

Housing Plan

Phase I: Brown School leasing continues.
 Phase II – III: Budget Revision Submitted and Approved.
 Phase II – III: ASA has been finalized.
 Phase IV: Tax Application in Progress.



April 2024 – Ribbon Cutting!

Neighborhood Plan

First Phase of Residential Façade Façade Improvement contracts with City and Homeowners are executed.

The Public Art Revitalization Program is underway. The Water Tower art project on 14th Street has began. Commercial Façade Program in development.

People Plan

316 Total CAH Families Have Enrolled in USI Case Management. 210 CAH Families Currently Enrolled in USI Case Management.

290 of the targeted youth residents have enrolled in health insurance.

87% of targeted residents have been employed in last 6 months.

49.30% eligible adults earn wage income.



Cleveland Avenue Homes

Housing Update

Utility connections are currently being retired. Notice of road closures has gone out. Fencing around CAH phase 2 and 3 will be going up in the next couple of weeks.

CAH management office is being relocated. HAWS did not receive funding requested to Forsyth County.

Section 3 / MWBE

Currently, demolition is set to begin in the next couple of days. As work resumes so will our Section 3 efforts.

Relocation Information

Relocation of residents in Phase 2 & 3 has concluded. Brown School Lofts continues to lease up final PBV Units.

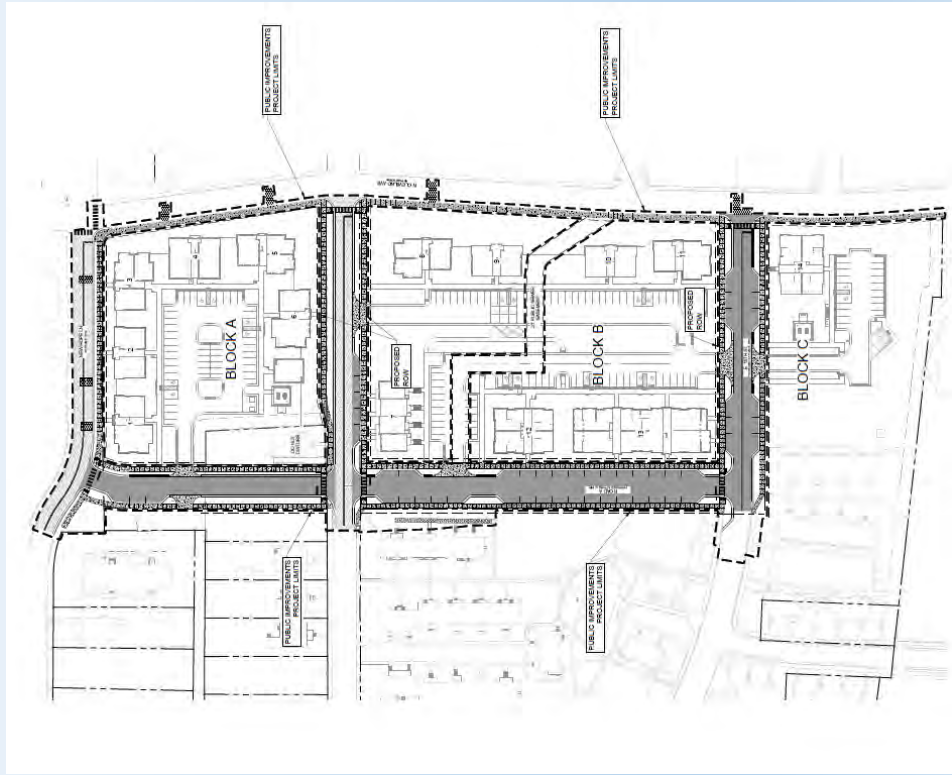
As of June 2024, we are **46** months into our 72 month CNI project effort



Phase 2 & 3

Housing Plan

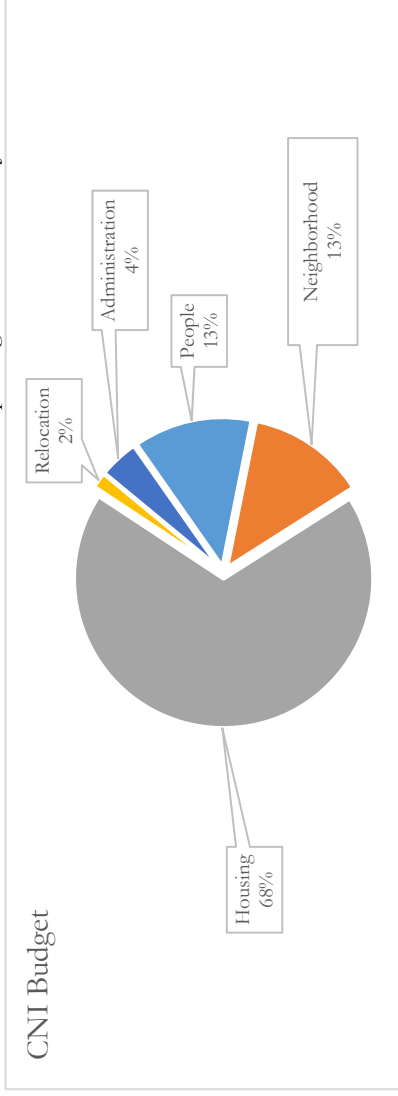
Demolition to begin July 2024



Choice Neighborhood Initiative Budget (HUD funds only)

People	4,500,000
Neighborhood	4,500,000
Housing	23,903,000
Relocation	597,000
Administration	1,500,000
\$	35,000,000.00

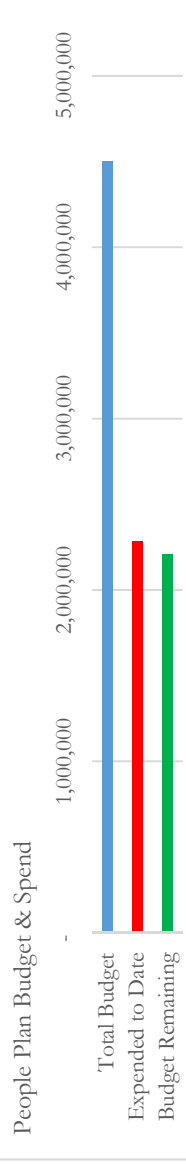
Reporting Period: June 2024



CNI Budget & Expenses by Area

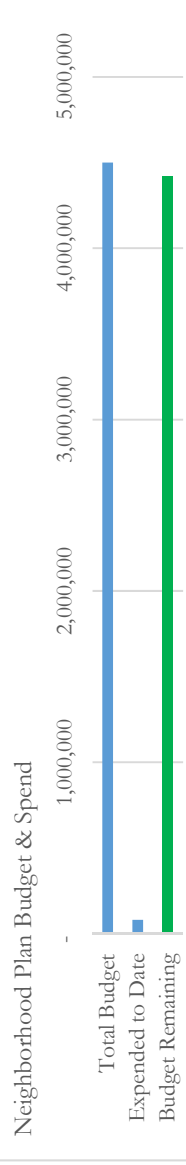
People Plan

Total Budget	4,500,000
Expended to Date	2,288,123
Budget Remaining	2,211,877
% Expended	51%



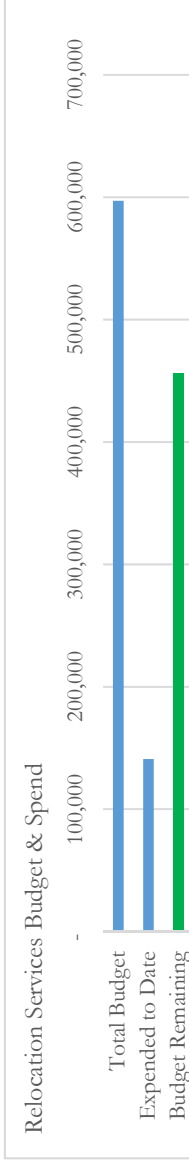
Neighborhood Plan

Total Budget	4,500,000
Expended to Date	80,875
Budget Remaining	4,419,125
% Expended	2%



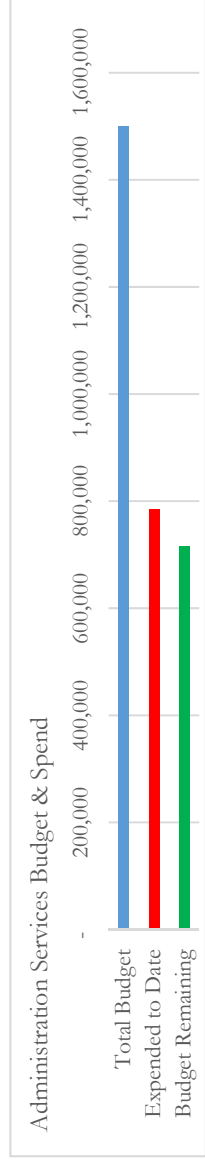
Relocation

Total Budget	597,000
Expended to Date	140,957
Budget Remaining	456,043
% Expended	24%



Administration

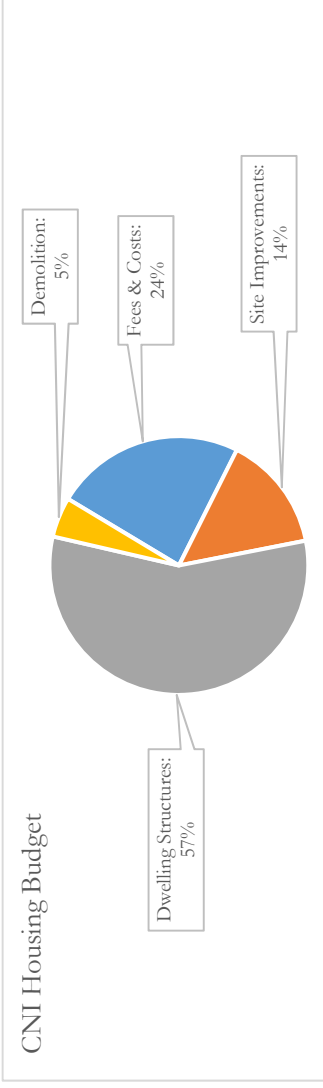
Total Budget	1,500,000
Expended to Date	784,502
Budget Remaining	715,498
% Expended	52%



CNI Housing Budget

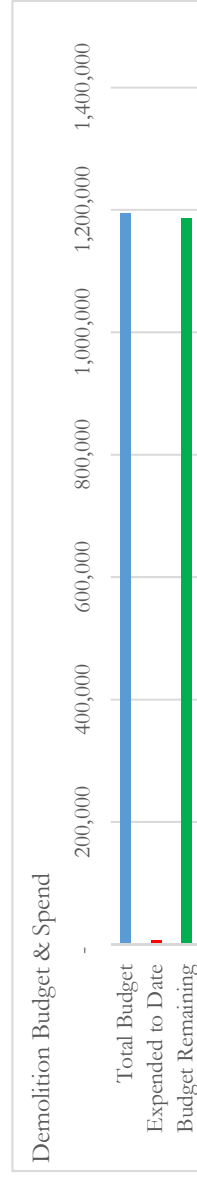
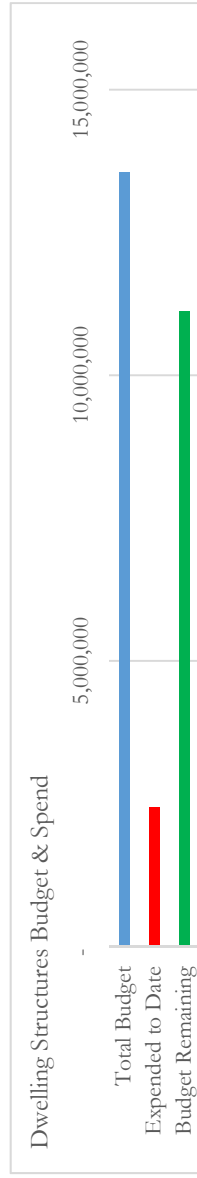
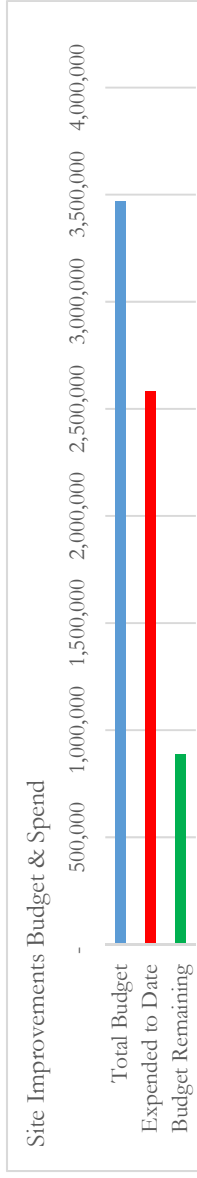
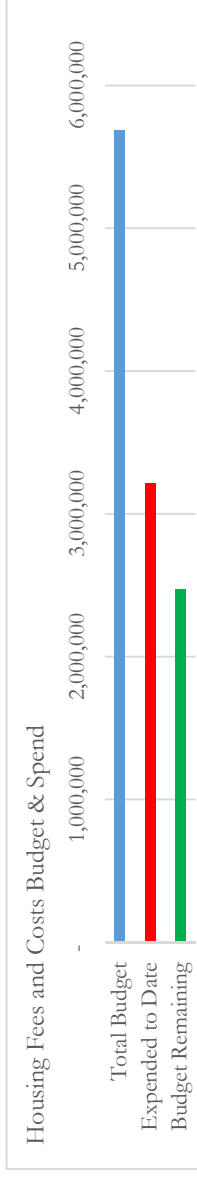
Reporting Period: June 2024

Fees & Costs:	5,686,157
Site Improvements:	3,469,334
Dwelling Structures:	13,553,509
Demolition:	1,194,000
	\$ 23,903,000



CNI Housing Budget & Expenses by Area

Fees and Costs	
Total Budget	5,686,157
Expended to Date	3,217,572
Budget Remaining	2,468,585
% Expended	57%
Site Improvements	
Total Budget	3,469,334
Expended to Date	2,582,707
Budget Remaining	886,627
% Expended	74%
Dwelling Structures	
Total Budget	13,553,509
Expended to Date	2,438,134
Budget Remaining	11,115,375
% Expended	18%
Demolition	
Total Budget	1,194,000
Expended to Date	7,547
Budget Remaining	1,186,453
% Expended	1%





WS Choice Neighborhood

CLEVELAND AVENUE HOMES PEOPLE STRATEGY MONTHLY REPORT

June 2024



TABLE OF CONTENTS



▪ **Report Narrative**

- Monthly Highlight – Transformation is Happening

▪ **Demographics**

- Target Population
- Race, ethnicity, age, income etc.

▪ **Education**

- 2024 High School Graduates

▪ **Health**

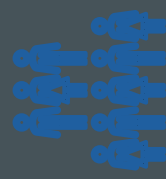
- Primary Care
- Health Insurance

▪ **Economic Mobility**

- Self-Sufficiency
- Employment

▪ **Difference Made**

▪ **Our Team**



EDUCATION



HEALTH & WELLNESS



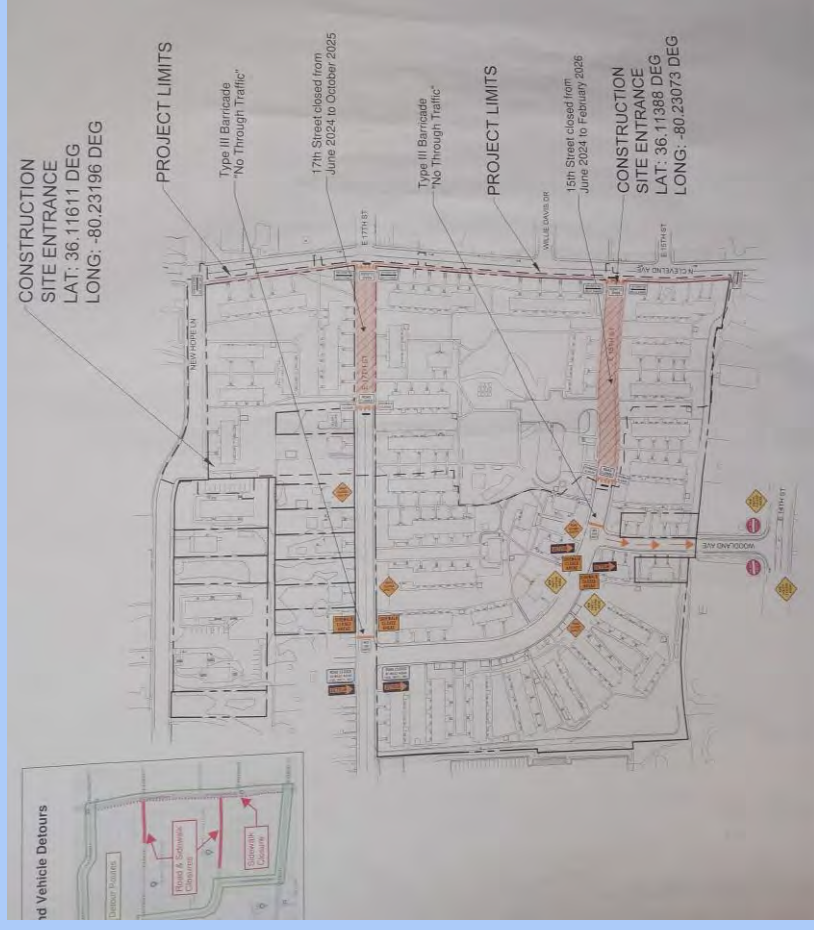
ECONOMIC MOBILITY



CLEVELAND AVENUE HOMES



The Winston-Salem Choice Neighborhood Initiative (i.e., Urban Strategies, Housing Authority of Winston-Salem, City of Winston-Salem, and McCormack Baron Salazar) Phase 2 transformation is beginning at the Cleveland Avenue Homes' site.



DEMOGRAPHICS

Metric	Total Count
Target Households (original)	220
Target Households Served (to date)	316
Target Households currently being served (original and new)	210
Target Households with Completed Assessments	210
Households Dismissed from Program (to date)	103
Original Households not in enrolled in Case Management	21
New Target Households post application/prior to relocation enrolled in Case Management	114
Target Households receiving TANF	0
Target Households enrolled in food stamps	167
Target Households enrolled in SSI or SSDI	50
Average Annual Household Wage Income (no SSI/SSDI)	\$23,853.00
Average Annual Hourly Wage Income	\$14.42

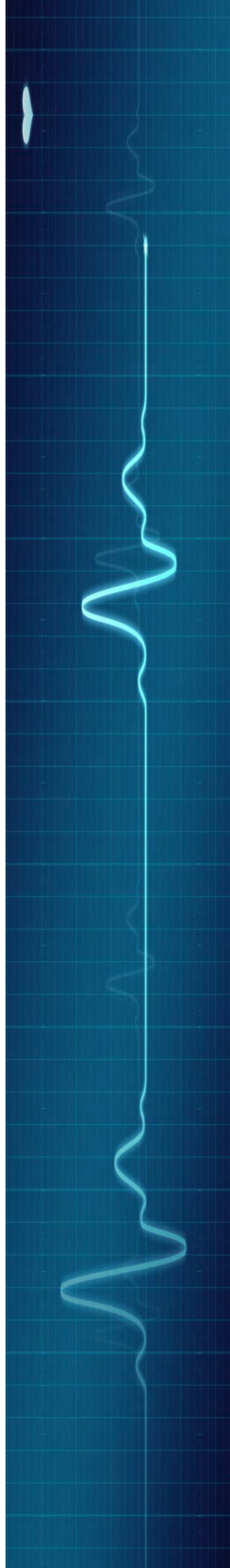


Metric	Number	Percent
Number and percentage of target adult residents (18-64 years of age) not able to work or train due to a disability	31	13.77%
Number and percentage of Limited English Proficiency (LEP) target residents	2	2.00%
Number and percentage of target residents with at least one chronic condition	169	31.76%

HEALTH

Adult Metric		
	Number	Percent
Number and percentage of target adult residents who have a place of healthcare where they regularly go, other than an emergency room, when they are sick or need advice about their health	172	82.30%
Number and percentage of target adult residents who have health insurance	170	81.30%

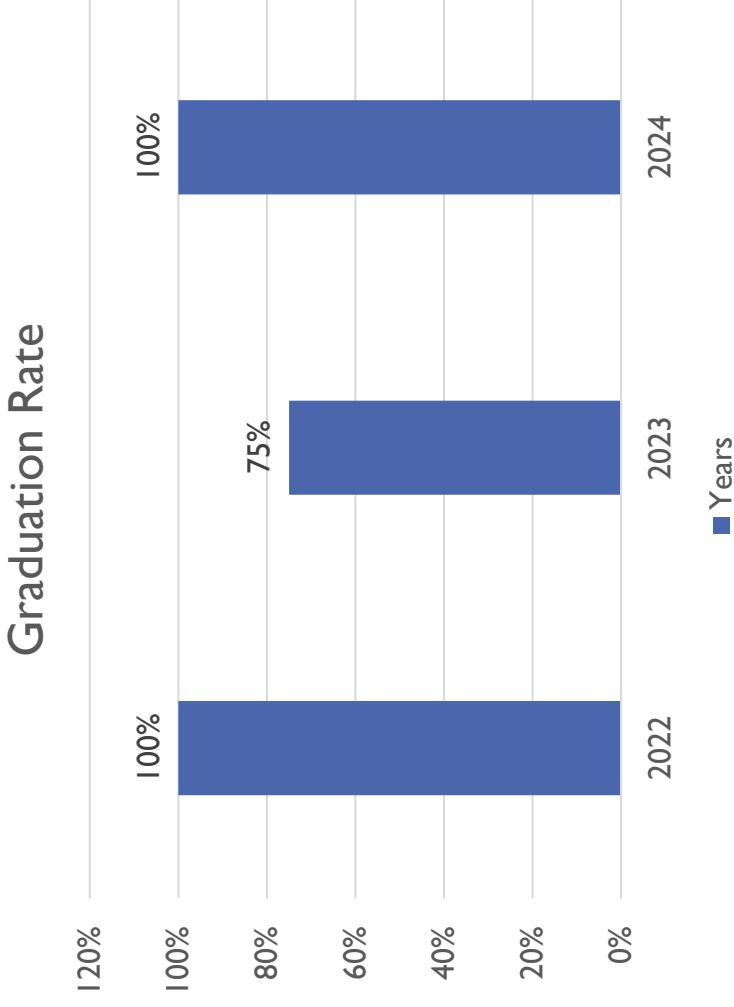
Youth Metric		
	Number	Percent
Number and percentage of target youth residents who have a place of healthcare where they regularly go, other than an emergency room, when they are sick or need advice about their health	280	96.20%
Number and percentage of target youth residents who have health insurance	290	99.70%



ECONOMIC MOBILITY

Metric	Number	Percent
Number and percentage of residents with wage income	69	49.30%
Number and percentage of target residents working full-time	49	71.00%
Number of target residents of target residents working part-time	20	29.00%
Number and percentage of target residents who are unemployed	71	50.70%
Number and percentage of target residents who have been employed for 6 months or longer	63	87.00%
Number and percentage of target residents receiving Unemployment Insurance	0	0.00%



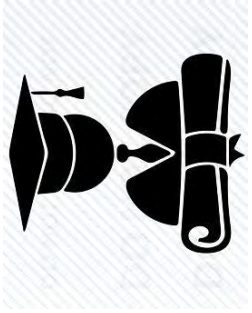
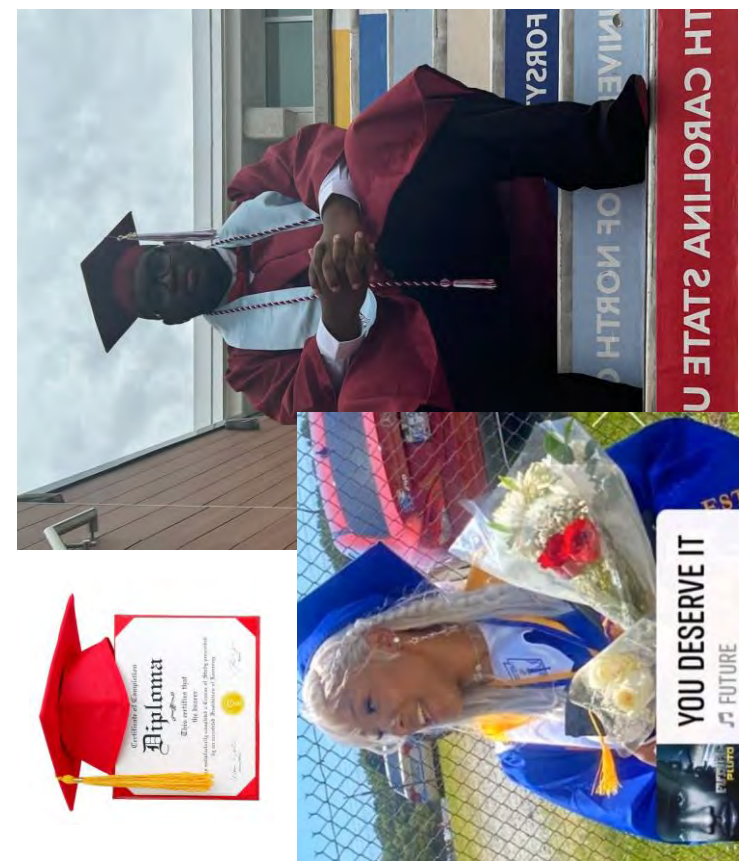


2024 Graduates

1. Aarian Covington - Britain Academy
2. Tylashia Mack - Carver High School
3. Arienna Pollard - Virtual Academy (Online)
4. Laniya Simpson - Carver High School
5. Nicholas Spencer - North Forsyth High School
6. Justace Williams - Parkland High School
7. Tayvon Woodruff - Carver High School



DIFFERENCE MADE



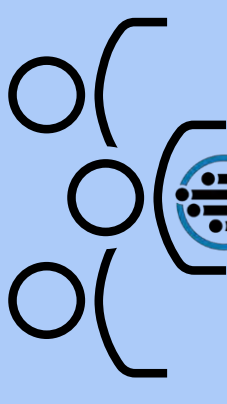
Class of 2024
CONGRATSI!

YOU DESERVE IT
FOR YOUR FUTURE



OUR TEAM

- **Eva Mosby, Southern Region Vice-President**
- **Tonya Atkins, Director of Operations**
- **Tresnese Barham, Project Manager**
- **Ebony Moore, Family Support Specialist Manager**
- **Jenay Cole, Family Support Specialist II**
- **Rhonda Killian, Mobility Specialist**
- **Jessica Martinez-Martinez, Family Support Specialist II**
- **Shennetta Robinson, Outreach Worker**
- **Shaveda Shaw, Family Support Specialist II**



HOUSING IMPLEMENTATION MONTHLY UPDATE



June 2024



Status of Development Activities

1. Phase 1 – *Brown School Lofts*
 - i. 100% Completion and Lease Up goal: end of July 2024
 1. Referral discounts for existing residents
 2. Discounts for preferred employers (students, teachers, first responders, etc.)
 - ii. Website/Marketing ongoing
 1. Please follow us on Facebook!
2. Phases 2 & 3
 - i. Housing Plans and Specs Submission to City Feb 2024
 - ii. Demo-Dispo Approval April 2024
 - iii. City Council Meetings to commit funds April 2024
 - iv. DEQ site permit issued May 2024
 - v. Demolition Start end of June 2024
 - vi. Building Permits Issued Summer 2024
 - vii. Civil Permits Issued Summer 2024
 - viii. Pricing and Financial Closing late Fall
3. Phase 4
 - i. Tax Credit Application Submitted to NCHFA May 10, 2024
 - ii. Construction Design Set for Pricing Fall 2024

HCV Report

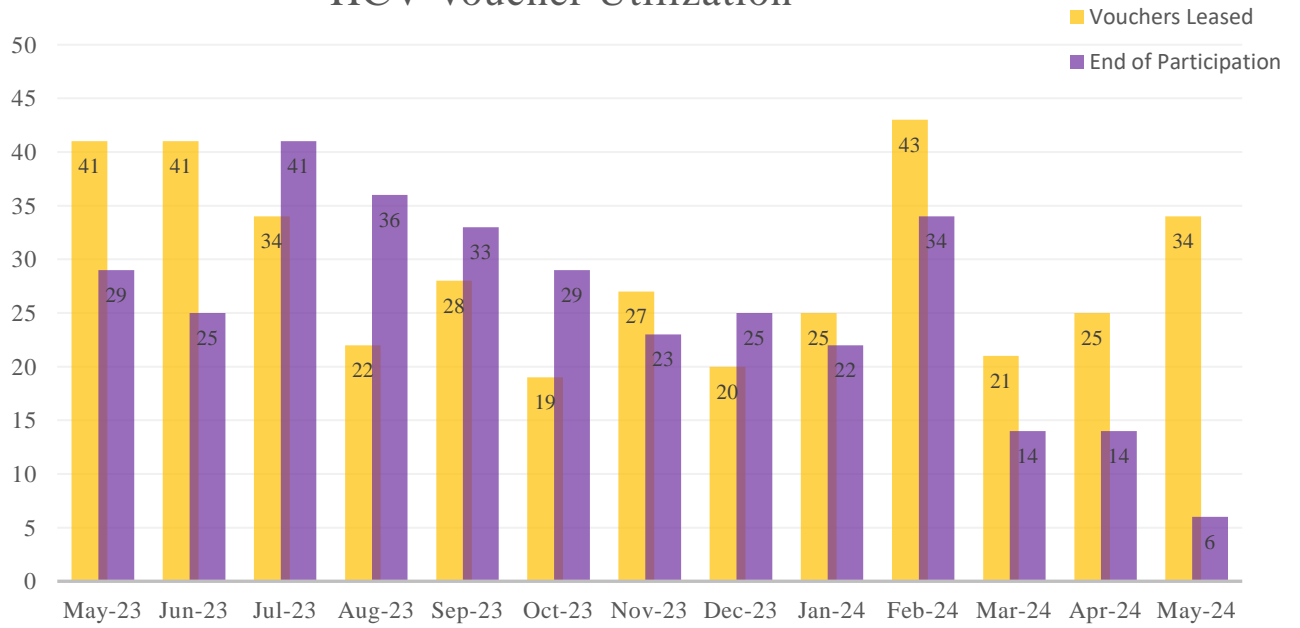
Housing Choice Voucher Program Report
5/31/2024

I. Voucher Unit Utilization	Current	Maximum	Percent Utilized	Target	NC Average as of 04/30/2024
Total Vouchers Leased - SEMAP indicator #13	3364	4537	74%	>90%	81.09%
Total Vouchers Issued for the month	21				
Total Voucher Leased for the month	34				
Total Vouchers Removed from the Program	6				
Vouchers Issued but not leased on the street	124				
Project-Based Vouchers (Currently in Place)	370	371	100%		93.90%
Special Programs	99	239	41%		
Mainstream	119	278	43%		66.81%
VASH	106	144	74%		73.24%
EHV	27	31	87%		69.89%
II. Voucher Budget Utilization					
Monthly	\$2,685,315	\$3,310,585	81%		
Average Monthly HAP	\$798				
III. Other SEMAP Indicators in PIC					
PIC Reporting Rate	98.84%			>94%	
Timely Re-examinations	95%			>95%	
Correct Rent Calculations	100%			>97%	
Pre-Contract HQS Inspections	100%			>97%	
Annual HQS Inspections	93%			>95%	
Family Self-Sufficiency					
Enrollment:# of Participants	69				
Percent with Escrow Accounts	73%				
IV. HCV Waiting List					
Number of Applicants Awaiting Voucher Issuance	5377				
V. Inspections					
Units Inspected	468				
Passed (1st Inspections)	269				
Failed	199				
Passed after re-inspection	129				
Number of Landlords receiving HAP	696				



HUD Income Limits - by household size as of 04/01/2024								
	1	2	3	4	5	6	7	8
Very Low	\$28,700	\$32,800	\$36,900	\$40,950	\$44,250	\$47,550	\$50,800	\$54,100
Extremely Low	\$17,200	\$20,440	\$25,820	\$31,200	\$36,580	\$41,960	\$47,340	\$52,720
Low	\$45,850	\$52,400	\$58,950	\$65,500	\$70,750	\$76,000	\$81,250	\$86,500
HUD Fair Market Rents - by unit bedroom size as of 10/01/2023								
	0	1	2	3	4			
	\$897	\$936	\$1,110	\$1,452	\$1,671			

HCV Voucher Utilization



	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24
Vouchers Leased	41	41	34	22	28	19	27	20	25	43	21	25	34
End of Participation	29	25	41	36	33	29	23	25	22	34	14	14	6

May 2024 End of Participation Reasons

2 - Tenant Preference

1 - Moved without Notice/HAP Contract Violation

2 - Eviction - Lease Violation

1 - Health Reasons

Public Housing

Public Housing Report

Reporting Month	Piedmont Park	Cleveland Ave	Sunrise Towers	Crystal Towers	Healy Towers	Townview	Stoney Glenn	The Oaks at Tenth	Camden Station	Brookside View	Totals
May	May	May	May	May	May	May	May	May	May	May	May
Public Housing Management Operations											
Occupancy Rate	88.75%	78.36%	91.28%	95.02%	95.24%	98.00%	92.00%	92.00%	93.33%	100.00%	92.52%
Number of Units	240	134	195	201	105	50	50	50	30	15	1070
Units Offline	3	1	0	1	0	1	2	0	0	0	8
Move Ins	3	5	0	0	3	1	1	0	0	0	13
Move Outs	10	9	4	1	3	0	1	2	1	0	31
Vacancies	17	24	13	8	5	1	2	2	1	0	73
# of Applicants Pulled	30	17	10	10	35	3	6	2	2	0	115
Charges Billed	\$51,650	\$22,840	\$38,874	\$55,043	\$38,355	\$11,073	\$18,484	\$15,471	\$10,392	\$9,479	\$271,661
Payments Collected	\$47,027	\$21,801	\$39,113	\$59,184	\$41,325	\$12,616	\$17,321	\$15,199	\$12,128	\$8,190	\$273,904
# Recertifications Due	27	19	22	9	6	6	2	7	3	2	103
# Recertifications Completed	27	16	22	9	6	6	2	7	3	2	100
Waiting List	10663	5075	4447	810	2231	5831	5876	8309	8035	957	52234
Lease Violations											
# of Late Payment Notices	127	41	92	74	15	21	23	19	15	7	434
# of Judicial evictions Filed in Court (Non-Payment)	11	6	10	10	1	4	5	0	0	0	47
# of Termination Notices (Other than Non-Payment)	11	0	0	0	0	0	0	0	0	0	11
# of Judicial Evictions Filed in Court (Other than Non-Payment)	1	0	0	0	0	0	0	0	0	0	1
Security											
# of Incidents Reported (WSPD)	61	30	23	14	6	6	4	4	1	0	149
# of Incidents Involving Residents	30	8	13	8	6	2	4	4	1	0	76
# of Violent/Drug Reports	18	4	2	2	0	0	0	0	0	0	26
Maintenance											
Opening Balance of Work Orders for BOM	57	35	11	9	16	18	6	12	9	8	181
# of Created Work Orders for the Month	389	87	141	167	30	46	29	28	13	1	931
# of Open Work Orders EOM	51	13	11	5	8	22	14	5	7	2	138
# of Emergency Work Orders EOM	6	7	0	0	0	2	2	5	3	0	25

*Cleveland Avenue Homes data reflect higher vacancy and lower rental revenues due to planned relocation of residents off site pursuant to the Choice Neighborhoods Grant Initiative ("CNI"). All units are being vacated in phases to allow for demolition and rebuild pursuant to the CNI grant. **Totals column excludes Cleveland Avenue Homes data.

Unsubsidized Housing

Unsubsidized Housing Report May 2024

	Drayton Pines	Plaza
Imperial Operations		
Occupancy Rate	95%	91%
Number of Units	44	77
Move Ins	0	2
Move Outs	0	3
Vacancies	2	7
# of Applicants Pulled	0	5
Charges Billed in May	\$49,022	\$36,453
Payments Collected in May	\$49,420	\$33,742
Waiting List	2	5
Lease Violations		
# of Late Payment Notices	4	18
# of Termination Notices (Other than Non-Payment)	0	0
# of Judicial evictions Filed in Court (Non-Payment)	2	0
# of Judicial Evictions Filed in Court (Other)	0	0
Security		
# of Incidents Reports	2	5
# of Violent/Drug Reports	0	0
# of Incidents Involving Residents	0	0
Maintenance		
Opening Balance of Work Orders for BOM	4	11
# of Created Work Orders for the Month	29	61
# of Open Work Orders EOM	9	19
# of Emergency Work Orders EOM	1	0

Resolutions

RESOLUTION NO. 2247

AUTHORIZING APPROVAL OF THE MAY 31, 2024 FINANCIAL STATEMENTS

WHEREAS, the Housing Authority of the City of Winston-Salem (the " Authority") operates on a Fiscal Year ending September 30; and

WHEREAS, the Authority prepares unaudited Financial Statements monthly, as mandated by the United States Department of Housing and Urban Development; and

WHEREAS, the unaudited Financial Statements dated May 31, 2024 were submitted to the Board of Commissioners for review; and

WHEREAS, the unaudited Financial Statements attached and referenced herein is a permanent record and will continue to be maintained in the Authority's permanent files;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners hereby accepts the unaudited Financial Statements dated May 31, 2024.

Adopted On: _____ (Date)

Signed: _____
Kevin Cheshire
Board Secretary

Housing Authority of Winston-Salem
Financial Highlights
May 31, 2024

Consolidated Statements

As of May 31, 2024, the total assets of the Authority were \$48,338,111 while total liabilities were \$11,936,974. The current ratio (current assets of \$8,977,029 divided by current liabilities of \$1,495,297) was 6.00.

The net loss excluding Housing Assistance Payments (HAP) and receipts is (\$817,365). There was negative cash flow excluding HAP payments and receipts of (\$399,373). The net gain prior to depreciation, extraordinary items and forgiveness of debt but inclusive of HAP income and expense was \$292,976. There was a consolidated net loss of (\$840,192). This included depreciation of \$1,133,168. Cash flow decreased by (\$422,200) including HAP receipts and expense. The overall total income was 10.58% over budget and total operating expenditures were (4.95%) under budget.

Low Income Public Housing

Total gross revenue through May 31, 2024 was \$6,929,655 and was under budget by (\$221,341). Tenant Rental Income of \$2,089,488 was over budget by \$37,884. Other Tenant Income of \$156,866 was under budget by (\$48,813).

Expense prior to depreciation and extraordinary items of \$7,346,398 was under budget by (\$452,855) or (5.81%).

The net loss for operations prior to depreciation and extraordinary item expenses was (\$482,172). The depreciation expense was \$1,015,858 and net loss including depreciation expense was (\$1,498,030).

Section 8 (Housing Choice Voucher Program)

The gross revenue generated from Section 8 through May 31, 2024 was \$23,343,213 and was over budget by \$3,234,932. The HAP Fees earned during this period were \$21,233,494 and the HAP expense was \$21,256,321. During the fiscal year to date, HUD has released \$2,450,485 of HUD-held reserves which helps offset increased HAP expenses.

Administrative income of \$2,109,719 and operating expense of \$1,639,103 produced a net gain of \$470,616 (excluding depreciation). Operating expense was under budget by (11.56%) or (\$214,335).

The Section 8 financial statements for the period ended May 31, 2024 resulted in net gain before depreciation of \$447,789. The net gain including depreciation was \$437,686.

Scattered Sites

The total revenue for scattered sites was \$577,913 and is under budget by (\$21,364.) Vacancies are the main cause of this variance.

Total Operating expense of \$597,756 was 14.02% or \$73,520 over budget.

The net loss before depreciation expense was (\$19,843) and the depreciation expense was \$93,594 for a net decrease after depreciation of (\$113,437).

Grants

The federal grants are cost reimbursement and therefore do not produce net income. The expenditures and salaries related to this grant are specified by HUD as resident service in nature.

State and local grants consist of Shelter Plus Care for the Homeless, AIDS and Chronic Mental Disorders. This is a cost reimbursement program for which HAWS collects management fees. The profit earned in this program will be transferred to Corporate at year end.

Other grant information included in this report is for activities associated with the PILOT grant for which we are utilizing the dollars that were paid up front and in our reserves. CHOICE Neighborhood funds and expenditures are included here as well.

Corporate Management

The total gross revenue was \$2,148,234, which was over budget by \$265,775 or 14.12%. Unbudgeted bond fee proceeds from Winston Summit (December) and Salem Gardens (April) are the main reason for this positive variance.

The total operating expense was \$1,909,295, which was under budget by (\$83,802) or (4.20%).

The net income including depreciation was \$237,608.

Imperial Management

Total revenue was \$206,355 and operating expense was \$152,857. Net income after depreciation expense was \$53,498.

Housing Authority of Winston-Salem
Consolidated Balance Sheet
As of May 31, 2024

	May-24	FYE 2023	Variance		May-23
			Amount	Percentage	
Assets					
Unrestricted cash	467,865	199,033	268,832	135.07%	468,366
Restricted Cash - Public Housing Resrv/Oper	2,534,492	3,580,405	(1,045,913)	-29.21%	2,727,203
Restricted Cash - HCV Admin Resrv/Oper	1,566,891	1,257,608	309,283	24.59%	797,084
Restricted Cash - HAP	(642,795)	(383,092)	(259,703)	-67.79%	157,338
Restricted Cash - Grants	0	0	0	0.00%	0
Restricted Cash - Other	838,705	709,394	129,311	18.23%	666,501
Accounts receivable-tenants, net	68,194	70,444	(2,250)	-3.19%	58,244
Accounts receivable-interest	2,792,919	2,817,096	(24,177)	-0.86%	2,659,376
Accounts receivable-other	921,127	793,488	127,639	16.09%	218,548
Prepaid Expenses	322,920	117,183	205,737	175.57%	338,934
Inventories	106,711	106,711	0	0.00%	110,180
Total Current Assets	8,977,029	9,268,270	(291,241)	-3.14%	8,201,774
Fixed Assets	100,358,949	100,315,254	43,695	0.04%	99,119,651
Less Accumulated Depreciation	(78,309,278)	(77,176,111)	(1,133,167)	-1.47%	(76,443,475)
Net Fixed Assets	22,049,671	23,139,143	(1,089,472)	-4.71%	22,676,176
Mortgage Receivable	15,431,450	15,491,269	(59,819)	-0.39%	12,371,120
Other	0	0	0	0.00%	0
Total Other Assets	15,431,450	15,491,269	(59,819)	-0.39%	12,371,120
Deferred Outflow of Resources	1,879,961	1,879,961	0	0.00%	1,084,146
Total Assets	48,338,111	49,778,643	(1,440,532)	-2.89%	44,333,216
Liabilities					
Accounts payable	33,119	289,077	(255,958)	-88.54%	251,506
Accrued Liabilities	445,518	805,129	(359,611)	-44.67%	439,473
Current Portion Long Term Debt	61,371	61,371	0	0.00%	50,971
Security Deposits/FSS Escrows	525,264	492,338	32,926	6.69%	448,520
Deferred Revenue	430,025	432,340	(2,315)	-0.54%	430,685
Total Current Liabilities	1,495,297	2,080,255	(584,958)	-28.12%	1,621,155
Line of Credit	471,659	486,801	(15,142)	-3.11%	487,309
Notes Payable-Noncurrent	5,743,615	5,780,932	(37,317)	-0.65%	5,921,704
Other	4,181,447	4,181,447	0	0.00%	1,361,279
Total Noncurrent Liabilities	10,396,721	10,449,180	(52,459)	-0.50%	7,770,292
Deferred Inflow of Resources	44,956	44,956	-	0.00%	1,568,599
Total Liabilities	11,936,974	12,574,391	(637,417)	-5.07%	10,960,046
Equity					
Investment in capital assets,net	16,355,578	16,810,039	(454,461)	-2.70%	16,812,530
Unrestricted net assets	20,885,751	17,031,294	3,854,457	22.63%	17,517,035
Restricted net assets	0	0	0	0.00%	0
Net income	(840,192)	3,362,919	(4,203,111)	-124.98%	(956,395)
Total Equity	36,401,137	37,204,252	(803,115)	-2.16%	33,373,170
Total Liabilities and Equity	48,338,111	49,778,643	(1,440,532)	-2.89%	44,333,216

TOTAL HA OF THE CITY OF WINSTON-SALEM
BALANCE SHEET

As of May 31, 2024

							May-24	FYE 9/30/2023		
	LIPH	Section 8	S. Sites	Grants	COCC	Imperial	ELIMINATION	Total HAWS	Total HAWS	Variance
ASSETS										
CURRENT ASSETS										
CASH										
UNRESTRICTED CASH			0		30,739	437,126		467,865	199,033	268,832
RESTRICTED CASH - PUBLIC HOUSING RESRV/OPER	2,534,492							2,534,492	3,580,405	(1,045,913)
RESTRICTED CASH - HCV ADMIN RESRV/OPER		1,566,891						1,566,891	1,257,608	309,283
RESTRICTED CASH - HAP		(642,795)						(642,795)	(383,092)	(259,703)
RESTRICTED CASH - GRANTS				0				0	0	-
RESTRICTED CASH - OTHER	320,037							320,037	223,437	96,600
FSS PROGRAM		341,999						341,999	299,718	42,281
SECURITY DEPOSITS	152,996		23,673					176,669	186,239	(9,570)
TOTAL CASH	3,007,525	1,266,095	23,673	0	30,739	437,126		4,765,158	5,363,348	(598,190)
ACCOUNTS RECEIVABLE-TENANTS	235,879		9,623					245,502	269,852	(24,350)
ACCOUNTS RECEIVABLE-HAP			2,240					2,240	0	2,240
ALLOWANCE FOR DOUBTFUL ACCOUNTS	(172,328)		(7,220)					(179,548)	(199,408)	19,860
NET ACCOUNTS RECEIVABLE-TENANTS	63,551	0	4,643	0	0	0		68,194	70,444	(2,250)
ACCOUNTS RECEIVABLE-MISC										
AR-HUD		718,736						718,736	552,771	165,965
AR- INTEREST					2,792,919			2,792,919	2,817,096	(24,177)
AR - OTHERS		94,475	45	107,622	355,656	38,173	(393,580)	202,391	240,717	(38,326)
TOTAL AR-MISC	0	813,211	45	107,622	3,148,575	38,173	(393,580)	3,714,046	3,610,584	103,462
PREPAID EXPENSES AND OTHER ASSETS										
PREPAID INSURANCE	121,135	36,371	16,958		38,938	3,993		217,395	64,345	153,050
PREPAID EXPENSES-OTHER	62,279	27,913	6,397		8,936			105,525	52,838	52,687
TOTAL PREPAID EXPENSES AND OTHER ASSETS	183,414	64,284	23,355	0	47,874	3,993		322,920	117,183	205,737
INVENTORIES	83,841					22,870		106,711	106,711	-
ALLOWANCE OBSOLETE INVENTORY								0	0	-
NET INVENTORY	83,841	0	0	0	0	22,870		106,711	106,711	-
TOTAL CURRENT ASSETS	3,338,331	2,143,590	51,716	107,622	3,227,188	502,162	(393,580)	8,977,029	9,268,270	(291,241)
NON-CURRENT ASSETS										
FIXED ASSETS										
LAND	1,097,631			99,962	459,763			1,657,356	1,657,356	-
LAND IMPROVEMENTS	567,273				69,730			637,003	637,003	-
BUILDINGS	82,485,009		9,080,777	264,119	1,969,987			93,799,892	93,756,197	43,695
LEASEHOLD IMPROVEMENTS	423,065	143,465						566,530	566,530	-
CONSTRUCTION IN PROGRESS	0				264,986			264,986	264,986	-
FEM-DWELLINGS	662,019			17,136				679,155	679,155	-
FEM-ADMINISTRATION	2,037,352	241,187			462,018	13,470		2,754,027	2,754,027	-
TOTAL FIXED ASSETS	87,272,349	384,652	9,080,777	381,217	3,226,484	13,470		100,358,949	100,315,254	43,695
ACCUMULATED DEPRECIATION	(68,884,014)	(384,652)	(6,360,848)	(167,238)	(2,499,056)	(13,470)		(78,309,278)	(77,176,111)	(1,133,167)
FIXED ASSETS, NET OF DEPRECIATION	18,388,335	0	2,719,929	213,979	727,428	0		22,049,671	23,139,143	(1,089,472)
MORTGAGE RECEIVABLE					11,650,254			11,650,254	11,710,073	(59,819)
NOTE RECEIVABLE - CHOICE PHASE I					3,781,196			3,781,196	3,781,196	-
TOTAL MORTGAGE RECEIVABLE	0	0	0	0	15,431,450	0		15,431,450	15,491,269	(59,819)
OTHER ASSETS										
NOTE RECEIVABLE - FEV								0	0	-
NOTES RECEIVABLE - SEC 8								0	0	-
OTHERS					312,000		(312,000)	0	0	-
TOTAL OTHER ASSETS	0	0	0	0	312,000	0	(312,000)	0	0	-
DEFERRED OUTFLOW OF RESOURCES	660,911	314,711	87,637		816,702			1,879,961	1,879,961	-
TOTAL NON-CURRENT ASSETS	19,049,246	314,711	2,807,566	213,979	17,287,580	0	(312,000)	39,361,082	40,510,373	(1,149,291)
TOTAL ASSETS	22,387,577	2,458,301	2,859,282	321,601	20,514,768	502,162	(705,580)	48,338,111	49,778,643	(1,440,532)

TOTAL HA OF THE CITY OF WINSTON-SALEM
BALANCE SHEET

As of May 31, 2024

	May-24						FYE 9/30/2023			
	LIPH	Section 8	S. Sites	Grants	COCC	Imperial	ELIMINATION	Total HAWS	Total HAWS	Variance
LIABILITIES AND EQUITY										
CURRENT LIABILITIES										
ACCOUNTS PAYABLE										
ACCOUNTS PAYABLE - VENDORS	451	31,698	448					32,597	279,084	(246,487)
ACCOUNTS PAYABLE - HUD		69						69	19	50
ACCOUNTS PAYABLE - OTHERS			228,535	38,516			(266,598)	453	9,974	(9,521)
TOTAL ACCOUNTS PAYABLE	451	31,767	228,983	38,516	0	0	(266,598)	33,119	289,077	(255,958)
ACCRUED LIABILITIES										
ACCRUED SALARIES AND WAGES					44,719			44,719	450,860	(406,141)
ACCRUED UTILITIES	140,890							140,890	89,098	51,792
ACCRUED INTEREST PAYABLE	152		5,122		439			5,713	5,713	-
ACCRUED PILOT - PHA WIDE	88,482							88,482	147,476	(58,994)
ACCRUED COMPENSATED ABSENCES	30,980	12,766	4,866		43,815	1,594		94,021	94,021	-
OTHER ACCRUED LIABILITIES	47,667	15,102	3,061		3,831	2,032		71,693	17,961	53,732
TOTAL ACCRUED LIABILITIES	308,171	27,868	13,049	0	92,804	3,626	0	445,518	805,129	(359,611)
OTHER CURRENT LIABILITIES										
TENANT SECURITY DEPOSITS	159,560		23,705					183,265	192,620	(9,355)
FSS ESCROW ACCOUNT		341,999						341,999	299,718	42,281
DEFERRED REVENUE	24,119	37,247	2,621		366,038			430,025	432,340	(2,315)
CURRENT PORTION-LT DEBT	3,444		35,663		22,264			61,371	61,371	-
TOTAL OTHER CURRENT LIABILITIES	187,123	379,246	61,989	0	388,302	0	0	1,016,660	986,049	30,611
TOTAL CURRENT LIABILITIES	495,745	438,881	304,021	38,516	481,106	3,626	(266,598)	1,495,297	2,080,255	(584,958)
NON-CURRENT LIABILITIES										
LONG TERM DEBT										
LINE OF CREDIT					471,659			471,659	486,801	(15,142)
NOTE PAYABLE TO CORPORATE			126,982				(126,982)	0	0	-
NOTE PAYABLE	713,154		4,941,832		462,000		(312,000)	5,804,986	5,842,303	(37,317)
TOTAL	713,154	0	5,068,814	0	933,659	0	(438,982)	6,276,645	6,329,104	(52,459)
LESS CURRENT PORTION	(3,444)		(35,663)		(22,264)			(61,371)	(61,371)	-
TOTAL LONG TERM DEBT - NET	709,710	0	5,033,151	0	911,395	0	(438,982)	6,215,274	6,267,733	(52,459)
NONCURRENT LIABILITIES-OTHER										
ACCRUED COMP. ABSENCES	92,939	38,327	14,598		131,446	4,782		282,092	282,092	-
ACCRUED PENSION & OPEB LIABILITIES	1,370,840	652,764	181,774		1,693,977			3,899,355	3,899,355	-
UNAMORTIZED ORIG ISSU DISC								0	-	-
TOTAL NONCURRENT LIABILITIES-OTHER	1,463,779	691,091	196,372	0	1,825,423	4,782	0	4,181,447	4,181,447	-
TOTAL NON-CURRENT LIABILITIES	2,173,489	691,091	5,229,523	0	2,736,818	4,782	(438,982)	10,396,721	10,449,180	(52,459)
DEFERRED INFLOW OF RESOURCES	15,805	7,525	2,096		19,530			44,956	44,956	-
TOTAL LIABILITIES	2,685,039	1,137,497	5,535,640	38,516	3,237,454	8,408	(705,580)	11,936,974	12,574,391	(637,417)
EQUITY										
INVESTED IN CAPITAL ASSETS, NET	17,671,737	0	(2,257,566)	213,979	727,428	0		16,355,578	16,810,039	(454,461)
UNRESTRICTED NET ASSETS	3,528,831	883,118	(305,355)	26,623	16,312,278	440,256		20,885,751	17,031,294	3,854,457
RESTRICTED NET ASSETS								0	0	-
NET INCOME/(LOSS) - HAP		(22,827)						(22,827)	(62,216)	39,389
NET INCOME/(LOSS)	(1,498,030)	460,513	(113,437)	42,483	237,608	53,498		(817,365)	3,425,135	(4,242,500)
TOTAL EQUITY	19,702,538	1,320,804	(2,676,358)	283,085	17,277,314	493,754	0	36,401,137	37,204,252	(803,115)
TOTAL LIABILITIES AND EQUITY	22,387,577	2,458,301	2,859,282	321,601	20,514,768	502,162	(705,580)	48,338,111	49,778,643	(1,440,532)

Housing Authority of the City of Winston- Salem
Consolidated Revenue and Expense Statement
October 1, 2023 - May 31, 2024

	YTD	YTD	Variance		5/31/2023
	Actual	Budget	Amount	Percentage	Actual
Operating Income					
HUD subsidy/grants	27,771,934	25,018,725	2,753,209	11.00%	24,504,713
HUD Admin Fee	2,106,319	1,990,507	115,812	5.82%	1,725,865
Dwelling rents	2,654,193	2,642,282	11,911	0.45%	2,202,800
Excess utilities & other	169,867	215,417	(45,550)	-21.15%	184,000
Transfer in	-	-	-	-	-
Other income	1,346,401	638,861	707,540	110.75%	437,262
Management fees	1,519,581	1,647,834	(128,253)	-7.78%	1,371,541
Interest on Hope VI Receivable	254,461	258,847	(4,386)	-1.69%	225,092
Interest on general fund	29,510	8,700	20,810	239.20%	16,614
Total Income	35,852,266	32,421,173	3,431,093	10.58%	30,667,887
Operating Expenditures					
Administrative	5,538,206	5,996,582	(458,376)	-7.64%	4,890,361
Tenant Services	2,106,991	2,221,374	(114,383)	-5.15%	5,514,056
Utilities	1,244,694	1,211,815	32,879	2.71%	1,077,104
Maintenance	2,909,830	3,102,163	(192,333)	-6.20%	2,486,840
Protective Services	389,151	497,716	(108,565)	-21.81%	332,044
General	1,602,895	1,480,191	122,704	8.29%	1,273,402
Total Operating Expenses	13,791,767	14,509,841	(718,074)	-4.95%	15,573,807
Other Expenditures					
Operating Transfer Out	-	-	-	-	-
Casualty Loss	65,429	-	65,429	100.00%	70,242
Housing Assistance Payments	21,702,094	18,431,885	3,270,209	17.74%	14,922,191
Total Other Expenditures	21,767,523	18,431,885	3,335,638	18.10%	14,992,433
Total Expenditures	35,559,290	32,941,726	2,617,564	7.95%	30,566,240
Net Income (Loss) before depreciation	292,976	(520,553)	813,529	156.28%	101,647
Depreciation expense	1,133,168	1,153,515	(20,347)	-1.76%	1,058,042
Net Income (Loss) after depreciation	(840,192)	(1,674,069)	833,877	49.81%	(956,395)
Other Changes In Cash					
Principal payments on debt	52,460	52,460	-	-	65,185
Capital Exp/Long Term Improvements	43,696	43,696	-	-	58,559
Replacement Reserve Pymts	-	-	-	-	-
Change in Assets/Liabilities	(795,774)	(795,774)	-	-	(518,503)
Depreciation expense add back	1,133,168	1,153,515	(20,347)	-1.76%	1,058,042
Cash Increase (Decrease)	(598,954)	(1,412,483)	813,529	57.60%	(540,600)

CONSOLIDATED STATEMENT OF REVENUE & EXPENSE

**BUDGETED PROGRAM ONLY
October 1, 2023 - May 31, 2024**

LIPH	Section 8 Programs	Scattered Sites	Grants	Corporate	Imperial	ELIMINATIONS	YTD ACTUAL	YTD BUDGET	VARIANCE AMOUNT	PERCENT	ANNUAL BUDGET	REMAINING AMOUNT	PERCENT
Operating Income													
HDD subsidy/grants	4,471,113	21,233,494	2,067,327				27,771,934	25,018,725	2,753,209	11%	42,868,433	15,096,499	35%
HDD Admin Fee	2,073,523		32,796				2,106,319	1,990,507	115,812	6%	2,895,299	788,980	27%
Dwelling rents	2,089,488	564,705					2,654,193	2,642,282	11,911	0%	3,963,423	1,309,230	33%
Excess utilities & other	156,866	13,001					169,867	215,417	(45,550)	-21%	131,526	(38,341)	-29%
Transfer in	0						0	0		0%	1,475,832	1,475,832	100%
Other income	211,032	29,264	546,773	559,087	38		1,346,401	638,861	707,540	111%	1,110,380	(236,021)	-21%
Management fees				254,461			254,461	258,847	(4,386)	-2%	398,270	143,809	36%
Interest on Hope VI Receivable				21,422			29,510	8,700	20,810	239%	13,051	(16,459)	-126%
Interest on general fund	1,156	6,932											
Total Income	6,929,655	23,343,213	2,646,896	2,148,234	206,355	0	35,852,266	32,421,173	3,431,093	11%	55,387,165	19,534,899	35%
Operating Expenditures													
Administrative													
Salaries	483,624	481,085	69,223	1,123,529	27,407		2,247,933	2,495,016	(247,083)	-10%	3,930,612	1,682,679	43%
Employee benefits	187,932	193,621	23,306	369,910	9,901		805,437	931,441	(126,004)	-14%	1,402,855	597,418	43%
Legal and accounting	35,581	49,027	3,882	33,333	6,487		128,310	107,667	20,643	19%	161,500	33,190	21%
Audit	52,272	18,111	4,946	5,599	3,024		83,952	51,660	32,292	63%	77,490	(6,462)	-8%
Travel and training	856	2,522		6,271	530		10,179	46,210	(36,031)	-78%	69,315	19,136	85%
Office rent	146,418	93,740		52,530	4,780		297,468	358,401	(60,933)	-17%	537,601	240,133	45%
Employee Parking	0	0					0	5,667	(5,667)	-100%	8,500	8,500	100%
Management fees	693,259	538,376	32,796				1,327,760	1,473,357	(145,597)	-10%	2,210,036	882,276	40%
Other	271,629	147,302	1,186	190,195	8,115		637,167	527,164	110,003	21%	780,549	143,382	18%
Total admin	1,871,571	1,523,784	177,268	1,754,521	53,757		5,538,206	5,996,582	(458,376)	-8%	9,178,458	3,640,252	40%
Tenant Services													
Salaries	52,614	34,157	52,614				139,385	181,556	(42,171)	-23%	287,378	147,993	51%
Contracts and other	42,332		1,872,954				1,915,286	1,976,506	(61,220)	-3%	8,225,308	6,310,022	77%
Employee benefits	15,633	18,251	18,436				52,320	63,312	(10,992)	-17%	94,968	42,648	45%
Total tenant services	110,579	52,408	1,944,004	0	0	0	2,106,991	2,221,374	(114,383)	-5%	8,607,654	6,500,663	76%
Utilities													
Water	322,402	6,002		1,325			329,729	323,705	6,024	2%	485,557	155,828	32%
Electric	517,402	6,678		8,335			532,415	508,854	23,561	5%	763,281	230,866	30%
Gas	381,386	1,164					382,550	379,257	3,293	1%	568,885	186,335	33%
Other							0	0		0%	0	0	0%
Total utilities	1,221,190	0	13,844	9,660	0	0	1,244,694	1,211,815	32,879	3%	1,817,723	573,029	32%
Ordinary maintenance													
Labor	521,001	78,954	10,526	10,526	39,032		649,513	804,379	(154,866)	-19%	1,273,118	623,605	49%
Overtime	44,164	9,138	1,045	1,045	622		54,969	54,000	969	2%	81,000	26,031	32%
Employee benefits Maint	222,442	30,471	2,380	2,380	29,973		285,266	341,719	(56,453)	-17%	512,578	227,312	44%
Materials	332,858	800	1,948	782	2,212		388,693	419,821	(31,128)	-7%	599,887	211,194	35%
Contract Costs	1,260,369	7,606	133,420	43,101	84,698	2,195	1,531,389	1,482,244	49,145	3%	2,117,134	585,745	28%
Total maintenance	2,380,834	8,406	45,049	99,431	74,034	0	2,909,830	3,102,163	(192,333)	-6%	4,583,717	1,673,887	37%
Protective Services													
Protective Services	358,735	9,273			21,143		389,151	497,716	(108,565)	-22%	751,817	362,666	48%
Total protective services	358,735	0	0	0	21,143	0	389,151	497,716	(108,565)	-22%	751,817	362,666	48%
General													
Insurance	339,528	54,505		28,617	3,923		456,059	434,071	21,988	5%	651,107	195,048	30%
Pilot	88,482						88,482	86,771	1,711	2%	130,157	41,675	32%
Collection Loss	142,144	24,805					166,949	82,067	84,882	103%	123,100	(43,849)	-36%

CONSOLIDATED STATEMENT OF REVENUE & EXPENSE

BUDGETED PROGRAM ONLY
October 1, 2023 - May 31, 2024

	LIPH	Section 8 Programs	Scattered Sites	Grants	Corporate	Imperial	ELIMINATIONS	YTD ACTUAL	YTD BUDGET	VARIANCE AMOUNT	PERCENT	ANNUAL BUDGET	REMAINING AMOUNT	PERCENT
Interest Expense	5,964		41,004		17,066			64,034	56,369	7,665	14%	84,553	20,519	24%
Other general expense	827,371							827,371	820,913	6,458	1%	1,231,369	403,998	33%
Total general	1,403,489	54,505	95,295	0	45,683	3,923		1,602,995	1,480,191	122,704	8%	2,220,286	617,391	28%
Total Operating Expenditures	7,346,398	1,639,103	597,756	2,146,358	1,909,295	152,857		13,791,767	14,509,841	(718,074)	-5%	27,159,655	13,367,888	49%
Other Expenditures														
Operating Transfer-Out								0	0	0	0%	0	0	0%
Casualty Losses	65,429							65,429	0	65,429	100%	0	(65,429)	0%
Housing assistance payments		21,256,321		445,773				21,702,094	18,431,885	3,270,209	18%	27,647,828	5,945,734	22%
Total Other Expenditures	65,429	21,256,321	0	445,773	0	0	0	21,767,523	18,431,885	3,335,638	18%	27,647,828	5,880,305	21%
Total Expenditures	7,411,827	22,895,424	597,756	2,592,131	1,909,295	152,857	0	35,559,290	32,941,726	2,617,564	8%	54,807,483	19,248,193	35%
Net Income (Loss) Before Depreciation	(482,172)	447,789	(19,843)	54,765	238,939	53,498	0	292,976	(520,553)	813,529	156%	579,682	286,706	49%
Gain/Loss Sales of Real Property								0	0	0	0%	0	0	0%
Depreciation	1,015,858	10,103	93,594	12,282	1,331			1,133,168	1,153,515	(20,347)	-2%	1,730,273	597,105	35%
Extra Ordinary Item								0	0	0	0%	0	0	0%
Net Income (Loss)	(1,498,030)	437,686	(113,437)	42,483	237,608	53,498	0	(840,192)	(1,674,069)	833,877	50%	(1,150,591)	(310,399)	-27%
Debt service	3,172		34,146		15,142			52,460	52,460	0	0%	100,187	47,727	48%
Capital Exp/Long Term Improvements	31,231			12,465				43,696	43,696	0	0%	1,700,000	1,656,304	-100%
Replacement Reserve Pymts								0	0	0	0%	13,200	13,200	100%
Change in Assets and Liabilities	(442,250)	(355,928)	53,167	(42,300)	(302,993)	294,530		(795,774)	(795,774)	0	0%	0	795,774	0%
Depreciation Add Back	1,015,858	10,103	93,594	12,282	1,331	0		1,133,168	1,153,515	(20,347)	-2%	1,730,273	597,105	35%
Net cash increase (used) in operations	(958,825)	91,861	(822)	0	(79,196)	348,028	0	(598,954)	(1,412,483)	813,529	58%	(1,233,705)	(2,226,299)	0

HOUSING AUTHORITY OF THE CITY OF WINSTON-SALEM
BALANCE SHEET & RATIO DATA
As of 5/31/2024

	003lr Piedmont	006lr Cleveland	008lr Sunrise	009lr Crystal	012lr Healy	021lr Townview	022lr Stoney	037lr The Oaks	038lr Camden Station	040lr 041lr Brookside View	160mr Plaza	165mr Drayton Pines
1000-00-000 ASSETS												
1300-00-000 TOTAL CURRENT ASSETS	873,760.76	801,854.06	512,840.39	216,347.90	323,654.84	186,414.43	171,277.09	199,589.83	134,294.54	106,918.44	-288,951.32	199,879.82
1499-00-000 TOTAL NONCURRENT ASSETS	1,289,352.27	1,360,376.78	1,204,431.84	1,172,337.49	944,344.37	947,155.58	2,423,881.01	3,709,348.67	2,855,196.96	2,481,910.61	236,479.43	2,483,448.49
1999-00-000 TOTAL ASSETS	2,163,113.03	2,162,230.84	1,717,272.23	1,388,685.39	1,267,999.21	1,133,570.01	2,595,158.10	3,908,938.50	2,989,491.50	2,588,829.05	-52,471.89	2,683,328.31

2000-00-000 LIABILITIES & EQUITY												
2001-00-000 LIABILITIES:												
2299-00-000 TOTAL CURRENT LIABILITIES	360,792.07	427,882.54	304,756.43	281,519.25	181,286.68	75,119.11	78,834.89	75,459.45	53,934.34	41,258.09	298,524.90	87,923.29
2399-00-000 TOTAL NONCURRENT LIABILITIES	14,542.02	25,475.58	15,787.49	15,241.85	7,718.27	3,714.32	3,530.18	2,878.83	529,979.66	183,780.36	2,748,369.06	2,172,397.97
2499-00-000 TOTAL LIABILITIES	375,334.09	453,358.12	320,543.92	296,761.10	189,004.95	78,833.43	82,365.07	78,338.28	583,914.00	225,038.45	3,046,893.96	2,260,321.26

2800-00-000 EQUITY												
2899-00-000 TOTAL EQUITY	1,787,772.08	1,708,872.72	1,396,728.31	1,091,924.29	1,078,994.26	1,054,736.58	2,512,793.03	3,830,600.22	2,405,577.50	2,363,790.60	-3,099,365.85	423,007.05

2999-00-000 TOTAL LIABILITIES AND EQUITY	2,163,056.17	2,162,230.84	1,717,272.23	1,388,685.39	1,267,999.21	1,133,570.01	2,595,158.10	3,908,938.50	2,989,491.50	2,588,829.05	-52,471.89	2,683,328.31
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	003lr Piedmont	006lr Cleveland	008lr Sunrise	009lr Crystal	012lr Healy	021lr Townview	022lr Stoney	037lr The Oaks	038lr Camden Station	040lr 041lr Brookside View	160mr Plaza	165mr Drayton Pines
CURRENT RATIO												
TOTAL CURRENT ASSETS	873,760.76	801,854.06	512,840.39	216,347.90	323,654.84	186,414.43	171,277.09	199,589.83	134,294.54	106,918.44	-288,951.32	199,879.82
TOTAL CURRENT LIABILITIES	360,792.07	427,882.54	304,756.43	281,519.25	181,286.68	75,119.11	78,834.89	75,459.45	53,934.34	41,258.09	298,524.90	87,923.29
CURRENT RATIO	2.42	1.87	1.68	0.77	1.79	2.48	2.17	2.64	2.49	17.10	-0.97	2.27

	003lr Piedmont	006lr Cleveland	008lr Sunrise	009lr Crystal	012lr Healy	021lr Townview	022lr Stoney	037lr The Oaks	038lr Camden Station	040lr 041lr Brookside View	160mr Plaza	165mr Drayton Pines
QUICK RATIO (Does not include inventory)												
TOTAL CURRENT ASSETS (less inventory)	842,742.63	764,366.26	509,435.26	210,686.41	322,123.15	185,733.67	170,596.33	198,987.95	131,521.62	106,918.44	-288,951.32	199,879.82
TOTAL CURRENT LIABILITIES	360,792.07	427,882.54	304,756.43	281,519.25	181,286.68	75,119.11	78,834.89	75,459.45	53,934.34	41,258.09	298,524.90	87,923.29
QUICK RATIO	2.34	1.79	1.67	0.75	1.78	2.47	2.16	2.64	2.44	17.10	-0.97	2.27

HOUSING AUTHORITY OF THE CITY OF WINSTON-SALEM
INCOME and EXPENSE DATA
 10/1/2023-5/31/2024

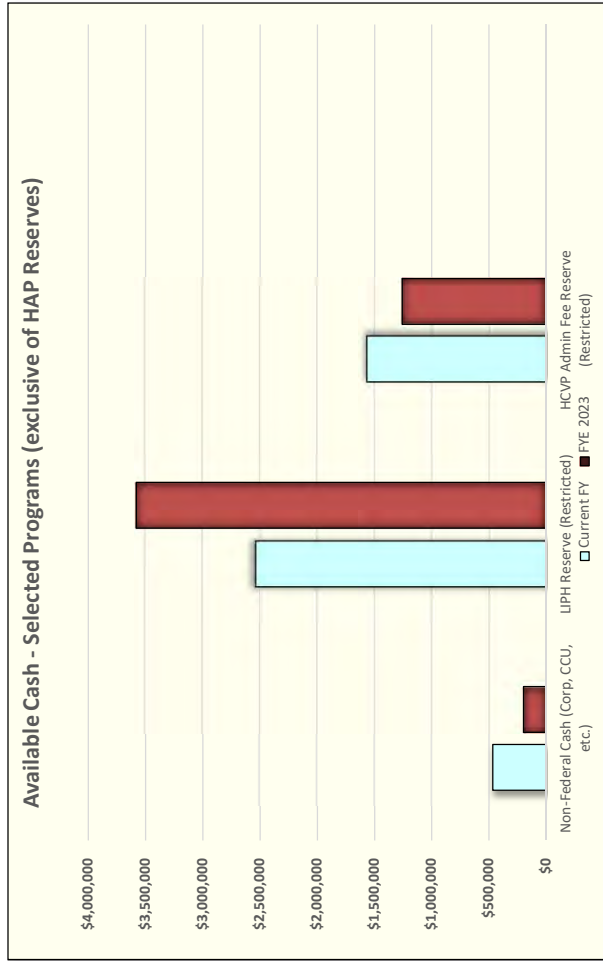
	003lr Piedmont	006lr Cleveland	008lr Sunrise	009lr Crystal	012lr Healy	021lr Townview	022lr Stoney	037lr The Oaks	038lr Camden Station	040lr 041lr Brookside View	160mr Plaza	165mr Drayton Pines
3000-00-000 INCOME												
3199-00-000 NET TENANT INCOME	407,483.35	252,024.44	321,904.00	419,900.10	304,307.00	119,992.33	132,970.96	134,396.00	82,663.00	70,712.47	298,435.82	279,269.94
3499-00-000 TOTAL GRANT INCOME	1,084,775.00	971,383.00	535,952.00	471,540.00	174,386.00	137,860.00	114,987.00	93,242.00	52,712.00	6,905.00	0.00	0.00
3699-00-000 TOTAL OTHER INCOME	31,294.69	25,111.47	16,502.44	28,594.71	830.92	53.59	95.37	149.97	50.25	26.29	10.08	196.61
3999-00-000 TOTAL INCOME	1,523,553.04	1,248,518.91	874,358.44	920,034.81	479,523.92	257,905.92	248,053.33	227,787.97	135,425.25	77,643.76	298,445.90	279,466.55
4000-00-000 EXPENSES												
4199-00-000 TOTAL ADMINISTRATIVE EXPENSES	430,101.53	250,335.34	322,422.69	329,843.02	185,009.73	88,849.35	89,733.22	98,955.42	51,159.79	24,282.35	110,533.82	66,733.96
4299-00-000 TOTAL TENANT SERVICES EXPENSES	22,454.65	17,912.26	20,764.91	22,342.18	15,796.57	2,940.89	2,640.90	2,933.03	2,110.97	682.47	0.00	0.00
4399-00-000 TOTAL UTILITY EXPENSES	386,398.79	321,876.95	215,252.78	153,336.93	77,484.37	6,001.25	20,269.94	24,545.36	8,589.55	5,434.41	8,654.42	5,189.52
4499-00-000 TOTAL MAINTENANCE EXPENSES	584,045.73	450,696.16	407,782.11	382,781.44	227,515.15	109,683.23	92,101.79	54,203.12	34,410.16	37,615.11	230,481.17	71,594.33
4499-99-000 TOTAL PROTECTIVE SERVICES	47,352.50	37,629.01	106,130.86	106,188.18	61,434.50	0.00	0.00	0.00	0.00	0.00	7,987.63	1,285.09
4599-00-000 TOTAL GENERAL EXPENSES	104,088.12	59,928.46	115,211.53	124,551.25	52,532.26	33,636.03	32,760.11	23,016.33	16,677.17	8,752.92	29,848.80	24,442.26
4699-00-000 TOTAL CASUALTY LOSS / EXTRAORDINARY MAINT	33,262.22	0.00	0.00	32,166.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4899-00-000 TOTAL FINANCING EXPENSES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,964.26	0.00	41,004.14
5999-00-000 TOTAL NONOPERATING ITEMS	231,136.67	114,724.08	113,827.35	85,229.39	65,135.18	55,492.92	79,985.83	117,855.72	89,498.88	62,971.52	20,784.48	72,809.60
8000-00-000 TOTAL EXPENSES	1,840,840.21	1,252,102.26	1,301,392.23	1,236,438.79	684,907.76	296,603.67	317,491.79	321,508.98	202,446.52	145,703.04	408,290.32	283,058.90
TOTAL EXPENSES (NO DEPRECIATION)	1,609,703.54	1,137,378.18	1,187,564.88	1,151,209.40	619,772.58	241,110.75	237,505.96	203,653.26	112,947.64	82,731.52	387,505.84	210,249.30
9000-00-000 NET INCOME	-317,287.17	-3,583.35	-427,033.79	-316,403.98	-205,383.84	-38,697.75	-69,438.46	-93,721.01	-67,021.27	-68,059.28	-109,844.42	-3,592.35
NET INCOME (LOSS) NO DEPRECIATION	-86,150.50	111,140.73	-313,206.44	-231,174.59	-140,248.66	16,795.17	10,547.37	24,134.71	22,477.61	-5,087.76	-89,059.94	69,217.25

	003lr Piedmont	006lr Cleveland	008lr Sunrise	009lr Crystal	012lr Healy	021lr Townview	022lr Stoney	037lr The Oaks	038lr Camden Station	040lr 041lr Brookside View	160mr Plaza	165mr Drayton Pines
LIPH CASH FLOW DATA												
NET INCOME (LOSS)	-317,287.17	-3,583.35	-427,033.79	-316,403.98	-205,383.84	-38,697.75	-69,438.46	-93,721.01	-67,021.27	-68,059.28	-109,844.42	-3,592.35
Capital Expense/Long Term Improvements	21,746.00		7,245.00	2,240.00								
Replacement Reserve Payments												
Extraordinary Items	33,262.00		32,166.40									
Depreciation Add Back	231,136.67	5,822.97	0.00	0.00	0.00	5,097.76	-3,281.71	0.00	0.00	0.00	0.00	0.00
Net Cash Increase (Used) in Operations	-31,142.50	2,239.62	-387,622.39	-314,163.98	-205,383.84	-33,599.99	-66,156.75	-93,721.01	-67,021.27	-68,059.28	-109,844.42	-3,592.35

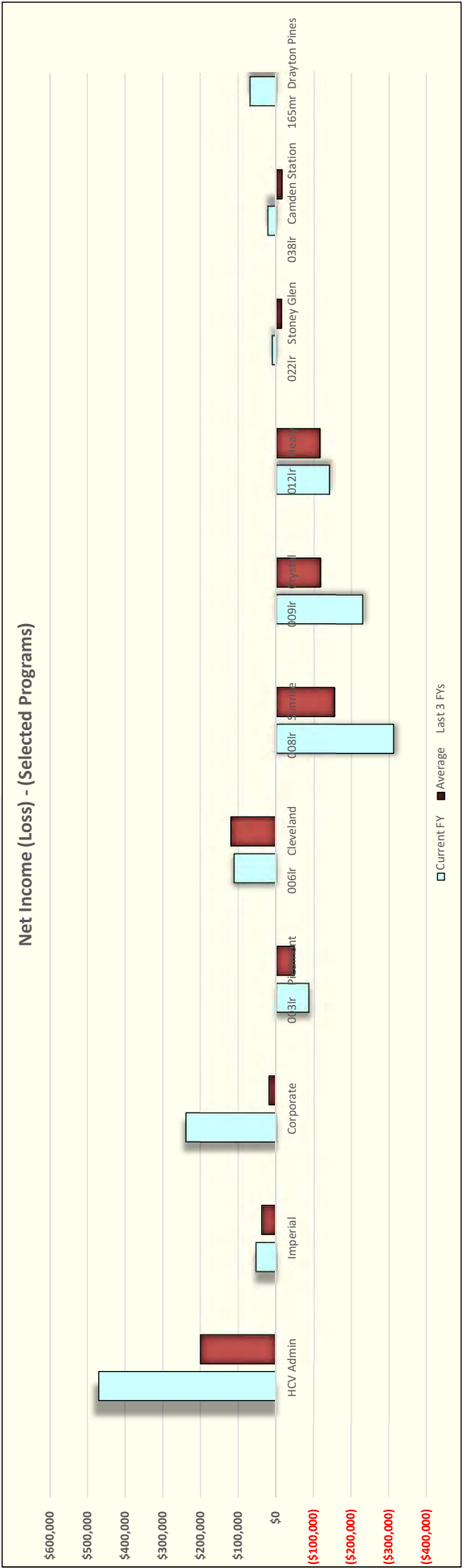
	003lr Piedmont	006lr Cleveland	008lr Sunrise	009lr Crystal	012lr Healy	021lr Townview	022lr Stoney	037lr The Oaks	038lr Camden Station	040lr 041lr Brookside View	160mr Plaza	165mr Drayton Pines
LIPH UNIT DATA												
# of Housing Units	240	244	195	201	106	49	48	50	30	15	78	44
Rental Months Year To Date	8	8	8	8	8	8	8	8	8	8	8	8
# Unit Months Year to Date	1,920	1,952	1,560	1,608	848	392	384	400	240	120	624	352
Average Rent Per Unit Month	174.84	107.97	197.43	255.39	351.18	297.95	329.62	329.72	338.78	583.43	465.44	779.17
Average Subsidy Per Unit	564.99	497.63	343.56	293.25	205.64	351.68	299.45	233.11	219.63	57.54	-	-
	739.83	605.61	540.99	548.64	556.83	649.63	629.07	562.82	558.41	640.97	465.44	779.17
Average Operating Expense Per Unit	838.39	582.67	761.26	715.93	730.86	615.08	618.51	509.13	470.62	689.43	621.00	597.30

HOUSING AUTHORITY OF THE CITY OF WINSTON-SALEM
FINANCIAL DASHBOARD - Selected Programs

AVAILABLE CASH (exclusive of HAP Reserves)	Current FY	FYE 2023	Change Over Prior FY
5/31/2024			
Non-Federal Cash (Corp, CCU, etc.)	\$467,865	\$199,033	\$268,832
LIPH Reserve (Restricted)	\$2,534,492	\$3,580,405	(\$1,045,913)
HCVF Admin Fee Reserve (Restricted)	\$1,566,891	\$1,257,608	\$309,283
Total Available Cash (excludes HAP reserve)	\$4,569,248	\$5,037,046	(\$467,798)



NET INCOME (LOSS) - (Selected Programs)	Current FY	Current Budget	Average 3 FYs
10/1/23-4/30/24			
HCV Admin	\$470,616	\$141,736	200,557
Imperial	\$53,498	\$18,890	37,390
Corporate	\$238,939	(\$110,638)	18,395
0031r Piedmont	(\$86,151)	(\$65,455)	(48,599)
0061r Cleveland	\$111,141	\$51,391	119,869
0081r Sunrise	(\$313,206)	(\$270,680)	(155,813)
0091r Crystal	(\$231,175)	(\$211,685)	(118,667)
0121r Healy	(\$140,249)	(\$146,631)	(117,283)
0211r Townview	\$16,795	\$15,040	26,159
0221r Stoney Glen	\$10,547	(\$14,571)	(14,839)
0371r The Oaks	\$24,135	\$3,682	8,031
0381r Camden Station	\$22,478	(\$12,980)	(16,279)
0401r/411r Brookside View	(\$5,088)	(\$8,368)	(8,062)
160mr Plaza	(\$89,060)	(\$24,097)	(4,487)
165mr Drayton Pines	\$69,217	\$99,138	52,615
Total Selected Programs	\$152,437	(\$535,228)	(\$21,012)
Depreciation	(\$1,120,886)	(\$1,142,346)	(\$1,291,794)
Total Selected Programs Net of Depreciation	(\$968,449)	(\$1,677,574)	(\$1,312,807)



RESOLUTION #2248

**RESOLUTION AUTHORIZING DEMOLITION AND DISPOSITION OF
CLEVELAND AVENUE HOMES**

WHEREAS, on August 12, 2020, the U.S. Department of Housing & Urban Authority (“**HUD**”) awarded a Choice Neighborhoods Initiative (CNI) Implementation Grant to The Housing Authority of the City of Winston-Salem (the “**Authority**”) for the purpose of redeveloping the area in and around Cleveland Avenue Homes (the “**CAH Site**”); and

WHEREAS, the Authority anticipates that the CAH Site will be developed in phases through a combination of demolition, new construction and rehabilitation, with the assistance of the Authority procured developer partner; and

WHEREAS, the Authority owns two tracts of land situated in the City of Winston-Salem, Forsyth County, North Carolina in the aggregate of approximately 6.8 acres (the “**Property**”);

WHEREAS, the Authority has determined there is a need to demolish the buildings located on the property for the future redevelopment of the CAH Site;

WHEREAS, in connection with the future redevelopment of the CAH Site, the Authority plans to prepare and submit a Section 18 disposition application to HUD for approval under the Section 18 Disposition (“**Section 18**”) Program with regard to the Property;

NOW, THEREFORE, in connection with the development of the CAH Site, the Board of Commissioners hereby adopts the following resolutions:

BE IT RESOLVED, that the Executive Director of the Authority and/or his designee is hereby authorized to review, approve and execute all certificates, affidavits, agreements, documents and other writings (collectively the “**Agreements**”) the Executive Director shall deem to be necessary or desirable in the consummation of the transactions herein contemplated;

BE IT FURTHER RESOLVED, that all acts, transactions, or agreements undertaken prior hereto by the Executive Director or his designee, in connection with the foregoing matters are hereby ratified and confirmed as the valid actions of the Authority, effective as of the date such actions were taken; and

BE IT FURTHER RESOLVED, that the Executive Director is hereby authorized and directed for and on behalf of, and as the act and deed of the Authority, to take such further action in the consummation of the transactions herein contemplated and to do any and all other acts and things necessary or proper in furtherance thereof, as the Executive Director shall deem to be necessary or desirable, and all acts heretofore taken by the designee of the Executive Director to such end are hereby expressly ratified and confirmed as the acts and deeds of the Authority.

This resolution shall be in full force and effect from and upon its adoption.

PASSED this ____ day of _____, 2024.

CHAIR

ATTEST:

Secretary

RESOLUTION NO. 2249

**RESOLUTION ADOPTING THE REVISED ADMISSION AND CONTINUED OCCUPANCY
POLICY (ACOP); THE REVISED HCV ADMINISTRATIVE PLAN (ADMIN PLAN);
AND THE 2024-2025 ANNUAL PLAN**

WHEREAS, the Admissions and Continued Occupancy Policy (ACOP) sets forth the policies, procedures, and regulations for operating the Low Rent Public Housing and Assisted Housing Programs; and

WHEREAS, The HCV Administrative Plan (Admin Plan) sets forth the policies, procedures, and regulations for operating the Housing Choice Voucher Programs; and

WHEREAS, the ACOP and the HCV Admin Plan have been revised to reflect all recent HUD requirements and mandates (as reflected in attached plans); and

WHEREAS, the Authority is required to update regulation changes in the Admissions and Continued Occupancy Policy (ACOP) and the HCV Administrative Plan (Admin Plan); and

WHEREAS, the Housing Authority has completed the HUD Public Housing Authority (PHA) Annual Plan template detailing any revisions to the Authority’s policies, programs, operations, and resident populations served, as well as the PHA’s strategy for addressing the housing needs of currently assisted families and the larger community; and

WHEREAS, a meeting of the Resident Advisory Board was held on May 30, 2024, for the purpose of presenting the proposed plan and seeking comments; and a copy of such comments are incorporated into the PHA Plan; and

WHEREAS, a public hearing was held on May 20, 2024 at 12:00 p.m. for the purpose of presenting the plan incorporated with the revisions to the ACOP and the HCV Admin Plan to the general public and seeking comments.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners hereby approves and authorizes the PHA 2024-2025 Annual Plan incorporated with the revisions to the ACOP and the HCV Admin Plan (attached hereto as Exhibit A).

Adopted On: _____ (Date)

Signed: _____
Kevin Cheshire
Board Secretary

Attachments

PHA Annual Plan 2024-2025 HAWS NC012

HUD-50075-ST

Attachment A-Housing Needs (Waiting Lists)

Attachment B-Financial Resources

Attachment C-Deconcentration Policy

Attachment D-HCV Administrative Plan (ADMIN Plan)

Attachment E-Public Housing Admissions and Continued Occupancy Plan (ACOP)

Attachment F-VAWA

Attachment G-Resident Advisory Board Meeting (RAB) May 30, 2024

Attachment H-Challenged Elements of the PHA Annual Plan

Attachment I-Capital Fund Program Five-Year Action Plan

Public Hearing Notification May 30, 2024

HUD-50077-SL Certification

HUD-50077-ST-HCV-HP

Board Resolution

Annual PHA Plan <i>(Standard PHAs and Troubled PHAs)</i>	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires: 03/31/2024
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Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families.

Applicability. The Form HUD-50075-ST is to be completed annually by **STANDARD PHAs** or **TROUBLED PHAs**. PHAs that meet the definition of a High Performer PHA, Small PHA, HCV-Only PHA or Qualified PHA do not need to submit this form.

Definitions.

- (1) **High-Performer PHA** – A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers, and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments if administering both programs, or PHAS if only administering public housing.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS or SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAP troubled.

A.	PHA Information.																										
A.1	<p>PHA Name: <u>The Housing Authority of the City of Winston-Salem</u> PHA Code: <u>NC012</u> PHA Type: <input checked="" type="checkbox"/> Standard PHA <input type="checkbox"/> Troubled PHA PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>10/2024</u> PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Public Housing (PH) Units <u>1336</u> Number of Housing Choice Vouchers (HCVs) <u>4815</u> Total Combined Units/Vouchers <u>6151</u> PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission</p> <p>Availability of Information. PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p>PHA Plans, including any updates will be posted at each AMP and at the Authority's Central Office located at 500 West Fourth Street, Suite 300, Winston-Salem, NC 27101. The PHA Public Hearing will be held at 500 West Fourth Street, Suite 300, Winston-Salem, NC 27101 on Thursday, May 30, 2024 at 12:00. Copies of the PHA Annual Plan can be requested by emailing kchurch@haws.or or by phone 336-917-6087.</p> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:																	
Participating PHAs	PHA Code					Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program																			
		PH	HCV																								
Lead PHA:																											

B.	Plan Elements					
B.1	<p>Revision of Existing PHA Plan Elements.</p> <p>(a) Have the following PHA Plan elements been revised by the PHA?</p> <p>Y N</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs (Attachment A)</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources. (Attachment B)</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Rent Determination.</p> <p>HCV Payment Standards per bedroom size are currently set at 120% of FMRs. The 0, 1, 2, 3, 4 bedroom payment standards became effective on 10/01/2023. 0BR-\$1076, 1BR-\$1123, 2BR-\$1332, 3BR-\$1742 and 4BR-\$2005</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Operation and Management.</p> <p>Revisions to the ACOP and ADMIN Plan (Attachment C and Attachment D)</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Grievance Procedures.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Asset Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Significant Amendment/Modification</p> <p>HOTMA Changes within the ADMIN Plan and the ACOP</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s): See above and/or attachments.</p> <p>(c) The PHA must submit its Deconcentration Policy for Field Office review. No change</p>					
B.2	<p>New Activities.</p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p>The Housing Authority was awarded a Choice Neighborhoods Implementation Grant in 2020 for the area including (and surrounding) the Cleveland Avenue Homes public housing community (Project Number NC012006), which includes approximately two-hundred forty-four (244) public housing units. The Housing Authority will continue to implement activities associated with its 2020 Choice Neighborhoods Implementation Grant award. Specifically, the Housing Authority will begin demolition of Phase 2 – an on-site phase, and also anticipates beginning site work and vertical construction of Phase 2.</p> <p>Additionally, the Housing Authority has a legacy HOPE VI – Happy Hill Gardens – that has been stagnant for some years. Happy Hill is a former public housing site razed and redeveloped with 2003 federal HOPE VI grant funds. The Housing Authority retains undeveloped lots encumbered by HUD restrictions. The Housing Authority has received approval to dispose of 13 of those lots, which it has done. The 13 lots are being developed by Habitat for Humanity of Forsyth County. The Housing Authority anticipates disposing of the remaining lots (following a disposition request) as part of a larger redevelopment effort in future years. Uncumbered lots on the periphery of the HOPE VI site are being developed by the Housing Authority for mixed-income rental and ownership opportunities (no operating subsidy attached).</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Mixed Finance Modernization or Development.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Demolition and/or Disposition.</p> <p>As referenced above, the Housing Authority is utilizing a Choice Neighborhoods Implementation Grant to redevelop the area in and around the Cleveland Avenue Homes public housing community (Project Number NC012006). The Housing Authority anticipates making a demolition application for Phase 4 of the Choice Neighborhoods initiative (Phase 2 and Phase 3 demolition applications have already been approved).</p>					

- Designated Housing for Elderly and/or Disabled Families.
- Conversion of Public Housing to Tenant-Based Assistance.
- Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD.
- Occupancy by Over-Income Families.
- Occupancy by Police Officers.
- Non-Smoking Policies.
- Project-Based Vouchers.

The Housing Authority will be utilizing project based vouchers to construct replacement units as part of the above-referenced Choice Neighborhoods Implementation Grant. The Housing Authority will be working through the HUD-CNI team to attach the PBVs to the various project phases.

Additionally, the Housing Authority of Winston-Salem (NC012) will be considering additional existing and new construction projects to which to attach project based vouchers. In the upcoming period, the Housing Authority anticipates issuing between 1 to 3 RFPs seeking projects to which vouchers will attach.

We currently have 4537 vouchers and we are currently utilizing 371 PBV vouchers. We are allocated 20% of our HCV unit program cap for PBV's which would allow us to utilize 907 PBV vouchers contribute to revitalization of a traditionally underserved neighborhood in a strategically vital area within the Housing Authority's Master Plan. We have 278 Mainstream Vouchers.

- Units with Approved Vacancies for Modernization.

The following units have been approved by HUD to be placed in the modernization category in PIC: NC012000003, unit 446, 513 and unit 599; NC012000009 unit 355; NC012000021 unit 1837 and NC012000006 unit 1187, unit 1111, unit 1112

- Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).

Progress Report.

B.3

Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.

The Housing Authority of the City of Winston-Salem's Mission

- (1) To create and maintain sustainable communities and create self-sufficiency through partnerships to benefit the residents of Winston-Salem.
- (2) To provide subsidized housing, affordable housing and housing choice vouchers to the extremely low and very low income citizens of Forsyth County.
- (3) To serve the City by providing decent and affordable housing to the most vulnerable citizens who cannot afford market-rate housing.

The Housing Authority's primary business goal is to diversify our portfolio of housing units in order to help stabilize and revitalize local communities. The Housing Authority partners with various businesses and service providers to accomplish our goals. These partnerships provide numerous business opportunities that promote economic growth and development within the City of Winston-Salem, Forsyth County and the state of North Carolina. The Authority aims to provide subsidized housing, affordable housing and rental assistance to low income individuals and families throughout the City and County.

Significant Amendment or Modification. Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan.

1. In accordance with HUD guidance, HAWS considers the following to be 'significant amendments or modifications': a) changes to rent or admissions policies or organization of the waiting list; b) additions of non-emergency CFP work items (items not included in the current CFP Annual Statement or CFP 5-Year Action Plan) or change in use of replacement reserve funds under the Capital Fund; or c) any change with regard to demolition or disposition, designation, homeownership programs or conversion activities.
2. Significant Amendment and Substantial Deviation/Modification
The PHA hereby defines "substantial deviation" and "significant amendment/modification" as any change in policy which significantly and substantially alters the Authority's stated mission and the persons the Authority serves. This would include admissions preferences, demolition and/or disposition activities, and conversion programs. Discretionary or administrative amendments consistent with the Authority's stated overall mission and basic objectives will not be considered substantial deviations or significant modifications.
3. If a significant amendment and/or substantial deviation/modification occur, the public process will include: consultation with the Resident Advisory Board, a public comment period, public notification of where and how the proposed change can be reviewed, and the approval by the Housing Authority Board.

B.4	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved. See HUD Form-50075.2 approved by HUD on <u>April 20, 2023 (Attachment E)</u></p>
B.5	<p>Most Recent Fiscal Year Audit.</p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/> Financial Audit 9/30/2023</p> <p>(b) If yes, please describe:</p>
<p>C. Other Document and/or Certification Requirements.</p>	
C.1	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/> See Attachment RAB Meeting held in person at Sunrise Towers at 10:00 a.m. on Thursday, May 30, 2024</p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p>
C.2	<p>Certification by State or Local Officials.</p> <p>Form HUD 50077-SL, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.3	<p>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</p> <p>Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.4	<p>Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.</p> <p>(a) Did the public challenge any elements of the Plan?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/> PHA Annual Plan Public Hearing held May 30, 2024</p> <p>If yes, include Challenged Elements.</p>
C.5	<p>Troubled PHA.</p> <p>(a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place?</p> <p>Y N N/A <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, please describe:</p>

D.	Affirmatively Furthering Fair Housing (AFFH).							
D.1	<p>Affirmatively Furthering Fair Housing (AFFH).</p> <p>Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.</p> <table border="1" data-bbox="178 483 1459 934"> <tr> <td data-bbox="178 483 1459 525">Fair Housing Goal:</td> </tr> <tr> <td data-bbox="178 525 1459 567"><i><u>Describe fair housing strategies and actions to achieve the goal</u></i></td> </tr> <tr> <td data-bbox="178 567 1459 934"> <p>The Housing Authority of the City of Winston-Salem examines its programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the agency's involvement; and maintain records reflecting these analyses and actions.</p> </td> </tr> </table> <table border="1" data-bbox="178 955 1459 1554"> <tr> <td data-bbox="178 955 1459 997">Fair Housing Goal:</td> </tr> <tr> <td data-bbox="178 997 1459 1039"><i><u>Describe fair housing strategies and actions to achieve the goal</u></i></td> </tr> <tr> <td data-bbox="178 1039 1459 1554"> <p>HAWS participates in development of the jurisdiction's Consolidated Plan, including participation in public meetings. Collaboration between the jurisdiction and HAWS insures that the Comprehensive Grant annual statement is consistent with the jurisdiction's assessment of low-income housing needs as evidenced in the Consolidated Plan. The Housing Authority participates in the City of Winston-Salem's New Horizon Fair & Affordable Housing Committee to promote fair and affordable housing activities during fair housing month and throughout the year.</p> <p>The public housing agency is not designated as troubled under 24 CFR Part 902 and is not subject to a Section 504 Voluntary Compliance Agreement.</p> <p>On October 4, 2017 HAWS, the City of Winston-Salem, and the County of Forsyth jointly submitted an Assessment of Fair Housing, which was accepted by the United States Department of Housing and Urban Development. HAWS continues to meet the goals in the Assessment of Fair Housing by updating our Admissions and Occupancy Policies and Procedures as regulations are promulgated.</p> </td> </tr> </table> <table border="1" data-bbox="178 1575 1459 1619"> <tr> <td data-bbox="178 1575 1459 1619">Fair Housing Goal:</td> </tr> </table>	Fair Housing Goal:	<i><u>Describe fair housing strategies and actions to achieve the goal</u></i>	<p>The Housing Authority of the City of Winston-Salem examines its programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the agency's involvement; and maintain records reflecting these analyses and actions.</p>	Fair Housing Goal:	<i><u>Describe fair housing strategies and actions to achieve the goal</u></i>	<p>HAWS participates in development of the jurisdiction's Consolidated Plan, including participation in public meetings. Collaboration between the jurisdiction and HAWS insures that the Comprehensive Grant annual statement is consistent with the jurisdiction's assessment of low-income housing needs as evidenced in the Consolidated Plan. The Housing Authority participates in the City of Winston-Salem's New Horizon Fair & Affordable Housing Committee to promote fair and affordable housing activities during fair housing month and throughout the year.</p> <p>The public housing agency is not designated as troubled under 24 CFR Part 902 and is not subject to a Section 504 Voluntary Compliance Agreement.</p> <p>On October 4, 2017 HAWS, the City of Winston-Salem, and the County of Forsyth jointly submitted an Assessment of Fair Housing, which was accepted by the United States Department of Housing and Urban Development. HAWS continues to meet the goals in the Assessment of Fair Housing by updating our Admissions and Occupancy Policies and Procedures as regulations are promulgated.</p>	Fair Housing Goal:
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Fair Housing Goal:								

Describe fair housing strategies and actions to achieve the goal

Instructions for Preparation of Form HUD-50075-ST Annual PHA Plan for Standard and Troubled PHAs

A. PHA Information. All PHAs must complete this section. (24 CFR §903.4)

A.1 Include the full PHA Name, PHA Code, PHA Type, PHA Fiscal Year Beginning (MM/YYYY), PHA Inventory, Number of Public Housing Units and or Housing Choice Vouchers (HCVs), PHA Plan Submission Type, and the Availability of Information, specific location(s) of all information relevant to the public hearing and proposed PHA Plan. (24 CFR §903.23(4)(e))

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table. (24 CFR §943.128(a))

B. Plan Elements. All PHAs must complete this section.

B.1 Revision of Existing PHA Plan Elements. PHAs must:

Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the "yes" box. If an element has not been revised, mark "no." (24 CFR §903.7)

Statement of Housing Needs and Strategy for Addressing Housing Needs. Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA's strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income); (ii) elderly families (iii) households with individuals with disabilities, and households of various races and ethnic groups residing in the jurisdiction or on the public housing and Section 8 tenant-based assistance waiting lists based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data. The statement of housing needs shall be based on information provided by the applicable Consolidated Plan, information provided by HUD, and generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. Once the PHA has submitted an Assessment of Fair Housing (AFH), which includes an assessment of disproportionate housing needs in accordance with 24 CFR §5.154(d)(2)(iv), information on households with individuals with disabilities and households of various races and ethnic groups residing in the jurisdiction or on the waiting lists no longer needs to be included in the Statement of Housing Needs and Strategy for Addressing Housing Needs. (24 CFR §903.7(a)).

The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. (24 CFR §903.7(a)(2)(i)) Provide a description of the ways in which the PHA intends, to the maximum extent practicable, to address those housing needs in the upcoming year and the PHA's reasons for choosing its strategy. (24 CFR §903.7(a)(2)(ii))

Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions. PHAs must submit a Deconcentration Policy for Field Office review. For additional guidance on what a PHA must do to deconcentrate poverty in its development and comply with fair housing requirements, see 24 CFR 903.2. (24 CFR §903.23(b)) Describe the PHA's admissions policy for deconcentration of poverty and income mixing of lower-income families in public housing. The Deconcentration Policy must describe the PHA's policy for bringing higher income tenants into lower income developments and lower income tenants into higher income developments. The deconcentration requirements apply to general occupancy and family public housing developments. Refer to 24 CFR §903.2(b)(2) for developments not subject to deconcentration of poverty and income mixing requirements. (24 CFR §903.7(b)) Describe the PHA's procedures for maintain waiting lists for admission to public housing and address any site-based waiting lists. (24 CFR §903.7(b)). A statement of the PHA's policies that govern resident or tenant eligibility, selection and admission including admission preferences for both public housing and HCV. (24 CFR §903.7(b)) Describe the unit assignment policies for public housing. (24 CFR §903.7(b))

Financial Resources. A statement of financial resources, including a listing by general categories, of the PHA's anticipated resources, such as PHA operating, capital and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support public housing or tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources. (24 CFR §903.7(c))

Attachment A

Housing Needs (Waiting Lists)

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List			
Waiting List Type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing If used, identify which development/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	5375		29%
Extremely low income <=30% AMI	4622	86%	
Very low income (>30% but <=50% AMI)	698	13%	
Low income (>50% but <80% AMI)	55	1%	
Families with children	2662	49.5%	
Elderly families	322	6.0%	
Families with Disabilities	863	16.1%	
Race/ethnicity (White)	768	14.3%	
Race/ethnicity (Black)	4691	87.3%	
Race/ethnicity (Asian/Other)	302	5.6%	
Race/ethnicity (Hispanic)	352	6.6%	
Characteristics by Bedroom Size (PH Only)			
1 BR	0	0.0%	
2 BR	0	0.0%	
3 BR	0	0.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)? 1 Month

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

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

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	39		7%
Extremely low income <=30% AMI	27	69.2%	
Very low income (>30% but <=50% AMI)	8	20.5%	
Low income (>50% but <80% AMI)	4	10%	
Families with children	0	0%	
Elderly families	22	56.4%	
Families with Disabilities	4	10.2%	
Race/ethnicity (White)	1	2.5%	
Race/ethnicity (Black)	37	17.9%	
Race/ethnicity (Asian/Other)	0	0%	
Race/ethnicity (Hispanic)	1	2.5%	
Characteristics by Bedroom Size (PH Only)			
1 BR	39	100%	
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

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

How long has it been closed (# of months)? 36 months

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

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

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	52		
Extremely low income <=30% AMI	40	84%	
Very low income (>30% but <=50% AMI)	6	11.50%	
Low income (>50% but <80% AMI)	6	11.5%	
Families with children	0	0%	
Elderly families	38	73%	
Families with Disabilities	0	0%	
Race/ethnicity (White)	12	23%	
Race/ethnicity (Black)	40	76.9%	
Race/ethnicity (Asian/Other)	00	0.0%	
Race/ethnicity (Hispanic)	00	0.0%	
Characteristics by Bedroom Size (PH Only)			
1 BR	52	100%	
2 BR		0%	
3 BR	0	0.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	28		
Extremely low income <=30% AMI	18	64.2%	
Very low income (>30% but <=50% AMI)	8	28.5%	
Low income (>50% but <80% AMI)	2	7.1%	
Families with children	16	57.1%	
Elderly families	6	21.4%	
Families with Disabilities	1	3.5%	
Race/ethnicity (White)	0	0%	
Race/ethnicity (Black)	25	89.2%	
Race/ethnicity (Asian/Other)	0	0%	
Race/ethnicity (Hispanic)	3	10.7%	
Characteristics by Bedroom Size (PH Only)			
1 BR	8	28.5%	
2 BR	14	50%	
3 BR	6	21.4%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	90		
Extremely low income <=30% AMI	39	0.0%	
Very low income (>30% but <=50% AMI)	50	0.0%	
Low income (>50% but <80% AMI)	1	0.0%	
Families with children	41	45.5%	
Elderly families	13	14.4%	
Families with Disabilities	8	8.8%	
Race/ethnicity (White)	3	3.3%	
Race/ethnicity (Black)	84	93.3%	
Race/ethnicity (Asian/Other)	0	0.0%	
Race/ethnicity (Hispanic)	3	1.7%	
Characteristics by Bedroom Size (PH Only)			
1 BR	46	51.1%	
2 BR	19	10%	
3 BR	17	18.8%	
4 BR	8	8.8%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	9		
Extremely low income <=30% AMI	1	11.1%	
Very low income (>30% but <=50% AMI)	1	11.1%	
Low income (>50% but <80% AMI)	7	77.7%	
Families with children	9	100%	
Elderly families	0	0%	
Families with Disabilities	1	11.1%	
Race/ethnicity (White)	1	11.1%	
Race/ethnicity (Black)	7	77.7%	
Race/ethnicity (Asian/Other)	00	0.0%	
Race/ethnicity (Hispanic)	01	11.1%	
Characteristics by Bedroom Size (PH Only)			
1 BR	0	40%	
2 BR	4	44.4%	
3 BR	5	55.5%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Piedmont

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

- Section 8 tenant-based assistance
- Public Housing**
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	10560		22%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	5145	48.7%	
Elderly families	358	3.4%	
Families with Disabilities	2186	20.7%	
Race/ethnicity (White)	2653	25.1%	
Race/ethnicity (Black)	8131	77.0%	
Race/ethnicity (Asian/Other)	687	6.5%	
Race/ethnicity (Hispanic)	858	8.1%	
Characteristics by Bedroom Size (PH Only)			
1 BR	7661	72.6%	
2 BR	2109	20.0%	
3 BR	698	6.6%	
4 BR	90	0.9%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Clevelan

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List			
Waiting List Type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing If used, identify which development/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	5073		18%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	2544	50.2%	
Elderly families	179	3.5%	
Families with Disabilities	1155	22.8%	
Race/ethnicity (White)	1192	23.5%	
Race/ethnicity (Black)	3985	78.6%	
Race/ethnicity (Asian/Other)	314	6.2%	
Race/ethnicity (Hispanic)	381	7.5%	
Characteristics by Bedroom Size (PH Only)			
1 BR	3690	72.7%	
2 BR	956	18.8%	
3 BR	356	7.0%	
4 BR	71	1.4%	
5 BR	0	0.0%	
5+ BR	0	0.0%	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Waitlist: Sunrise

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

- Section 8 tenant-based assistance
- Public Housing**
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	4468		23%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	1269	28.4%	
Elderly families	255	5.7%	
Families with Disabilities	1225	27.4%	
Race/ethnicity (White)	1341	30.0%	
Race/ethnicity (Black)	3216	72.0%	
Race/ethnicity (Asian/Other)	332	7.4%	
Race/ethnicity (Hispanic)	394	8.8%	

Characteristics by Bedroom Size (PH Only)			
1 BR	4466	100.0%	
2 BR	0	0.0%	
3 BR	0	0.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Crystal

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List			
Waiting List Type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing If used, identify which development/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	801		77%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	161	20.1%	
Elderly families	128	16.0%	
Families with Disabilities	364	45.4%	
Race/ethnicity (White)	269	33.6%	
Race/ethnicity (Black)	532	66.4%	
Race/ethnicity (Asian/Other)	59	7.4%	
Race/ethnicity (Hispanic)	76	9.5%	
Characteristics by Bedroom Size (PH Only)			
1 BR	801	100.0%	
2 BR	0	0.0%	
3 BR	0	0.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Waitlist: Healy

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

- Section 8 tenant-based assistance
- Public Housing**
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	2230		11%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	523	23.5%	
Elderly families	429	19.2%	
Families with Disabilities	856	38.4%	
Race/ethnicity (White)	663	29.7%	
Race/ethnicity (Black)	1579	70.8%	
Race/ethnicity (Asian/Other)	145	6.5%	
Race/ethnicity (Hispanic)	171	7.7%	
Characteristics by Bedroom Size (PH Only)			
1 BR	2227	99.9%	
2 BR	0	0.0%	
3 BR	0	0.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Townview

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

- Section 8 tenant-based assistance
- Public Housing**
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional)Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	5832		12%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	3342	57.3%	
Elderly families	139	2.4%	
Families with Disabilities	930	16.0%	
Race/ethnicity (White)	1186	20.3%	
Race/ethnicity (Black)	4790	82.1%	
Race/ethnicity (Asian/Other)	355	6.1%	
Race/ethnicity (Hispanic)	396	6.8%	
Characteristics by Bedroom Size (PH Only)			
1 BR	0	0.0%	
2 BR	5422	93.0%	
3 BR	409	7.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Stoney

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

- Section 8 tenant-based assistance
- Public Housing**
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	5876		121.
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	3136	53.4%	
Elderly families	155	2.6%	
Families with Disabilities	971	16.5%	
Race/ethnicity (White)	1204	20.5%	
Race/ethnicity (Black)	4802	81.7%	
Race/ethnicity (Asian/Other)	323	5.5%	
Race/ethnicity (Hispanic)	367	6.3%	
Characteristics by Bedroom Size (PH Only)			
1 BR	0	0.0%	
2 BR	5876	100.0%	
3 BR	0	0.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Oaks

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	8310		16%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	4572	55.0%	
Elderly families	238	2.9%	
Families with Disabilities	1483	17.9%	
Race/ethnicity (White)	1546	18.6%	
Race/ethnicity (Black)	6930	83.4%	
Race/ethnicity (Asian/Other)	428	5.2%	
Race/ethnicity (Hispanic)	500	6.0%	
Characteristics by Bedroom Size (PH Only)			
1 BR	5561	66.9%	
2 BR	2156	25.9%	
3 BR	592	7.1%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	1	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Camden

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List

Waiting List Type: (select one)

- Section 8 tenant-based assistance
- Public Housing**
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing
If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	8627		13%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	4783	55.4%	
Elderly families	249	2.9%	
Families with Disabilities	1534	17.8%	
Race/ethnicity (White)	1580	18.3%	
Race/ethnicity (Black)	7207	83.5%	
Race/ethnicity (Asian/Other)	442	5.1%	
Race/ethnicity (Hispanic)	510	5.9%	

Characteristics by Bedroom Size (PH Only)			
1 BR	5738	66.5%	
2 BR	2297	26.6%	
3 BR	591	6.9%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	

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

How long has it been closed (# of months)?

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

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

Waitlist: Brooksdv

B. Housing Needs of Families on the Public Housing Waiting Lists

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

Housing Needs of Families on the Waiting List			
Waiting List Type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) Housing If used, identify which development/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	957		0.0%
Extremely low income <=30% AMI	0	0.0%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	0	0.0%	
Families with children	607	63.4%	
Elderly families	24	2.5%	
Families with Disabilities	174	18.2%	
Race/ethnicity (White)	189	19.8%	
Race/ethnicity (Black)	787	82.2%	
Race/ethnicity (Asian/Other)	60	6.3%	
Race/ethnicity (Hispanic)	44	4.6%	
Characteristics by Bedroom Size (PH Only)			
1 BR	0	0.0%	
2 BR	0	0.0%	
3 BR	957	100.0%	
4 BR	0	0.0%	
5 BR	0	0.0%	
5+ BR	0	0.0%	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Attachment B

Financial Resources

**Financial Resources:
Planned Sources and Uses**

Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2024 grants)		
a) Public Housing Operating Fund	\$6,857,081	Public Housing Operations
b) Public Housing Capital Fund	\$4,027,972	Capital Improvements
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$30,673,350	Housing Assistance Payments and Admin Fee
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	N/A	
g) Resident Opportunity and Self-Sufficiency Grants	\$81,950	Ross Coordinator Salary
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
Family Self Sufficiency	\$94,024	FSS Coordinator Salary
2. Prior Year Federal Grants (unobligated funds only) (list below)		
HOPE VI	\$46,000	Public Housing capital improvements/development activities
Capital Fund*	\$6,127,327	
HOPE VI Choice Neighborhoods	\$23,704,847	
3. Public Housing Dwelling Rental Income	\$3,383,871	Public Housing Operations
4. Non-federal sources (list below)		
Sources	Planned \$	Planned Uses
5. Non-federal sources (list below)		
PILOT	\$75,828	
Total resources	\$75,072,250	

Attachment C

Deconcentration Policy

**The Housing Authority of the City of Winston-Salem
Deconcentration and Income Mixing Analysis Results**

Component 3, (6) Deconcentration and Income Mixing

a. Yes No: Does the PHA have any general occupancy (family) public housing development covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b. Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Development Name:	Deconcentration Policy for Covered Developments		Deconcentration policy (If no explanation) {see step 5 at §903.2 (c) (1)(v)}
	Number of Units	Explanation (if any) [see step 4 at §903.2(c) (1) (iv)]	

Attachment F

Deconcentration Rule

- A. Objective: The objective of the Deconcentration Rule for public housing units is to ensure that families are housed in a manner that will prevent a concentration of poverty families and/or a concentration of higher income families in any one development. The specific objective of the housing authority is to house no less than 40 percent of its public housing inventory with families that have income at or below 30 percent of the area median income by public housing development. Also, the housing authority will take actions to insure that no individual development has a concentration of higher income families in one or more of the developments. To insure that the housing authority does not concentrate families with higher income levels, it is the goal of the housing authority not to house more than 60 percent of its units in any one development with families whose income exceeds 30 percent of the area median income. The housing authority will track the status of family income, by development, on a monthly basis by utilizing income reports generated by the housing authority's computer software system.

- B. Actions:** To accomplish the deconcentration goals, the housing authority will take the following actions:
- i.** At the beginning of each housing authority fiscal year (October 1st), the housing authority will establish a goal for housing 40 percent of its new admissions with families whose incomes are at or below the area median income. The annual goal will be calculated by taking 40 percent of the total number of move-ins from the previous housing authority fiscal year.
 - ii.** To accomplish the goals of:
 - (a)** housing not less than 40 percent of its public housing inventory on an annual basis with families that have incomes at or below 30 percent of area median income, and
 - (b)** not housing families with incomes that exceed 30 percent of the area median income in developments that have 60 percent or more of the total household living in the development with incomes that exceed 30 percent of the area median income, the housing authority may implement one or more of the following:
 - Skip over certain families on the waiting lists based on incomes;
 - Utilize affirmative marketing efforts and promotion of supportive services/amenities (i.e. after-school tutorial, 24-hour emergency maintenance, etc.) to encourage new applicants with appropriate income levels;
 - Consult and inform applicants on the waiting list of deconcentration goals;
 - Utilization of the working preference.

Attachment D

HCV Administrative Plan Outline of Changes
(Full Revised & Board Approved ADMIN
Plan in separate attachment)

Memo to Staff
Proposed Changes to the Administrative Plan
May 13, 2024
Alexander M. Boston

Changes Listed by Chapter in the Order in which they occur in the Text.
Changes from the Model NMK Plan

- 1) Overview
 - a. The PHA policy section under program description was altered to include the Family Self-Sufficiency Program, the Family Unification Program, and the Veterans Affairs Supportive Housing Program.
- 2) Fair Housing & Equal Opportunity
 - a. Discrimination Complaints are now described more specifically. It notes the four items that PHAs are required to do when we receive a housing discrimination complaint, as well as that we are required to provide the applicant or participant with information as to how to file a discrimination complaint. These are now separate from Fair Housing Complaints and VAWA complaints.
 - b. The HAWS Limited English Proficiency Language Action Plan was updated to reflect changes in standards for LAPs and highlighting HUD guidance (PIH Notice 2024-04) that clarifies the use of Operating and Capital funds to address LEP requirements.
- 3) Eligibility
- 4) Applications, Waiting List, and Tenant Selection
- 5) Briefings and Voucher Issuance
- 6) Income and Subsidy Determinations.
 - a. New Guidebook information has been incorporated regarding Temporarily absent family members, including absent students.
 - b. HUD published an expanded list of exclusions from income. These include payments as part of the Domestic Volunteer Service Act of 1973, benefits under reduced price lunches and WIC, dependency and indemnity compensation, Native American Housing Assistance and Self Determination Act funds, any refund issued under the Internal Revenue Code, and assistance received under the Emergency Rental Assistance Program.
 - c. The PHA will not establish a policy of Phased-In Hardship Relief. The PHA will not include any extensions for hardship exemptions. The PHA will not establish any permissive deductions.
- 7) Verification
 - a. The Verification Requirements have been modified to state that the family must supply any information that the PHA or HUD determines is necessary to the administration of the program and must consent to PHA verification of that information [24 CFR 982.551].
 - b. In general, third-party documents provided by the family or the source must be dated within 120 days of the date received by the PHA.
 - c. Business owners and self-employed persons will be required to provide both an audited financial statement for the previous fiscal year if an audit was conducted

and all schedules completed for filing federal and local taxes in the preceding year. If an audit was not conducted, a statement of income and expenses must be submitted and the business owner or self-employed person must certify to its accuracy.

- d. If the family declares that it receives irregular or no payments in an alimony or child support situation, in addition to the verification process listed above in the chapter, the family must provide evidence that it has taken all reasonable efforts to collect amounts due. This may include:
 - i. A statement from any agency responsible for enforcing payment that shows the family has requested enforcement and is cooperating with all enforcement efforts
 - ii. If the family has made independent efforts at collection, a written statement from the attorney or other collection entity that has assisted the family in these efforts
 - e. Retirement Account verification standards are simplified to accept third party documents, dependent upon the family member's retirement status.
- 8) National Standards for the Physical Inspection of Real Estate and Rent Reasonableness Determinations
- a. HAWS has added additional deficiencies to the NSPIRE standards that the PHA considers Life Threatening. These are the same standards we have had in previous Administrative Plans.
 - b. A new form (HUD-52590) is now referenced with regards to when the family is responsible for supplying the stove and/or refrigerator.
 - c. HAWS will implement Biennial NSPIRE inspection standards. If a unit passed its last annual inspection at the first scheduled inspection, the unit will not be due for its next regular inspection for 24 months. It must be inspected within 24 months of the last full NSPIRE inspection. For these biennially inspected units, should a special (complaint) inspection take place in the 2nd 12-month period following the last regular inspection, a full NSPIRE inspection will take place as a regular inspection, resetting the annual inspection 'clock'. Units that fail the first regular annual inspection will be inspected within 12 months of that inspection.
 - d. HUD requires that PHAs undertake quality control inspections of sample units. Now the regulations additional require that the selected sample will include (1) each type of inspection (initial, annual, and special), (2) inspections completed by each inspector, and (3) units from a cross-section of neighborhoods.
- 9) General Leasing Policies
- 10) Moving with Continued Assistance and Portability
- a. HAWS has created a policy regarding Voucher Extensions and Expiration around porting. It says that to receive or continue receiving assistance under the initial PHA's voucher program, a family that moves to another PHA's jurisdiction under portability must be under HAP contract in the receiving PHA's jurisdiction within 90 days following the expiration date of the initial PHA's voucher term (including any extensions). (See "Initial Billing Deadline" for one exception to this policy.)
- 11) Annual Reexaminations
- a. HAWS will not create a policy of applying the asset limitation to reexaminations. However, if the PHA is alerted that a family has surpassed the asset limits, the

PHA will alert the family to its status as above the asset limit, and delay the initiation of termination or eviction proceedings for up to 6 months.

12) Termination of Assistance and Tenancy

13) Owners

14) Program Integrity

15) Special Housing Types

- a. The Homeownership Assistance Payments section has been modified in Section 15-VII.K, to state that the PHA may pay the homeownership assistance payments directly to the family, or at the PHA's discretion, to a lender on behalf of the family. If the assistance payment exceeds the amount due to the lender, the PHA must pay the excess directly to the family. Homeownership assistance for a family terminates automatically 180 calendar days after the last homeownership assistance payment on behalf of the family. However, a PHA may grant relief from this requirement in those cases where automatic termination would result in extreme hardship for the family.

16) Program Administration

17) Project Based Vouchers

- a. The Subsidy Layering Requirements are modified. The PHA may provide PBV assistance only in accordance with HUD subsidy layering regulations [24 CFR 4.13] and other requirements. Subsidy layering requirements do not apply to existing housing. A further subsidy layering review is not required for new construction or rehabilitation if HUD's designee has conducted a review that included a review of PBV assistance in accordance with the PBV subsidy layering guidelines.
- b. The Choice Neighborhood Initiative generated the need to significantly alter Section 17-VI.D. It now states that PBV developments constructed as part of the Choice Neighborhoods Initiative ("CNI") will provide a preference for families who were relocated out of the Cleveland Avenue Homes public housing community and are applying to the PBV development as a returning family. Please see Exhibits 1 and 2 for a fuller explanation, as fully incorporated herein by reference, of the manner in which the relocation of residents as part of the CNI, will be undertaken. Exhibit 1 is the Cleveland Avenue Homes Winston-Salem Choice Neighborhood Relocation Plan. Exhibit 2 is the Right to Return Policy of the Housing Authority of the City of Winston-Salem for Cleveland Avenue Homes Choice Neighborhood Initiative.

18) Special Purpose Vouchers

- a. The Continuum of Care Emergency Housing Vouchers section is added so these vouchers are also managed under this plan.
- b. A new Part VIII has been added to the Chapter for the Emergency Housing Vouchers (EHVs) first created in the aftermath of the Pandemic. The new rules formalize the particular regulatory concerns of EHVs.

19) The Family Self-Sufficiency Program and the FSS Action Plan

20) Purpose, Scope, and Applicability, of the Family Self-Sufficiency Program

21) FSS Program Administration

22) Selecting and Serving FSS Families

23) FSS Contract Participation

- 24) FSS Escrow Account
- 25) Portability in Section 8 FSS Programs

Changes from the 2023 Admin Plan

- 1) Overview
 - a. On July 29, 2016, the Housing Opportunity Through Modernization Act of 2016 (HOTMA) was signed into law. HOTMA made numerous changes to statutes governing HUD programs, including sections of the United States Housing Act of 1937. Title I of HOTMA contains 14 different sections that impact the public housing and Section 8 programs. The Final Rule implementing broad changes to income and asset in Sections 102 and 104 of HOTMA, and for PHAs that administer the public housing program over-income provisions in Section 103, was officially published in the Federal Register on February 14, 2023. On September 29, 2023, HUD issued notice PIH 2023-27, which provided guidance to PHAs on the implementation of the program changes described in the Final Rule.
- 2) Fair Housing & Equal Opportunity
 - a. In all cases, the PHA will advise the family that they may file a fair housing complaint if the family feels they have been discriminated against under the Fair Housing Act.
 - b. Our Administrative Plan now divides complains under the Equal Access Final Rule, VAWA complaints, and General Housing Discrimination Complaints into different subparts.
 - c. The Limited English Proficiency Language Action Plan has been expanded.
- 3) Eligibility
 - a. Eligibility now requires meeting net asset and property ownership restrictions. These are presented in 3-III.C and permit denial of assistance when a family has net assets in excess of \$100,000 or owns real property suitable for occupancy by the family as a residence.
 - b. The definition of “family” has been modified to now include, “an otherwise eligible youth who has attained at least 18 years of age and not more than 24 years of age and who has left foster care, or will leave foster care within 90 days, in accordance with a transition plan described in section 475(5)(H) of the Social Security Act (42 U.S.C. 675(5)(H)), and is homeless or is at risk of becoming homeless at age 16 or older.”
 - c. New definitions have been added for foster child and foster adult.
 - d. The PHA has been required to establish a policy that revocation of consent to access financial records to verify family income will result in denial of admission.
- 4) Applications, Waiting List, and Tenant Selection
 - a. All requirements and preferences for special programs are now addressed in Chapter 18, Special Purpose Vouchers.
- 5) Briefings and Voucher Issuance
- 6) Income and Subsidy Determinations.
 - a. The definition of Annual Income has been substantially modified. This includes that now Annual income includes “all amounts received,” not the amount that a

family may be legally entitled to receive but did not receive. For example, a family's child support or alimony income must be based on payments received, not the amounts to which the family is entitled by court or agency orders [Notice PIH 2023-27].

- b. HOTMA removed the statutory authority for the EID. The EID is available only to families that are eligible for and participating on the program as of December 31, 2023, or before; no new families may be added on or after January 1, 2024. If a family is receiving the EID prior to or on the effective date of December 31, 2023, they are entitled to the full amount of the benefit for a full 24-month period. The policies below are applicable only to such families. No family will still be receiving the EID after December 31, 2025. The EID will sunset on January 1, 2026, and the PHA policies below will no longer be applicable as of that date or when the last qualifying family exhausts their exclusion period, whichever is sooner.
- c. The rules regarding student financial assistance have been dramatically modified in line with HOTMA's new Student Financial Assistance Requirements.
- d. The list of Additional Exclusions from Annual Income in Chapter 6-I.M has been expanded significantly.

7) Verification

- a. The PHA has established a policy that revocation of consent to access financial records will result in denial of admission or termination of assistance in accordance with PHA policy.
- b. In order for a family to revoke their consent, the family must provide written notice to the PHA.
- c. Within 10 business days of the date the family provides written notice, the PHA will send the family a notice acknowledging receipt of the request and explaining that revocation of consent will result in denial or termination of assistance, as applicable. At the same time, the PHA will notify their local HUD office.
- d. The PHA will use any Safe Harbor determination to determine a family's income provided by another public entity such as DSS.
- e. For self-employed individuals who claim they do not to file tax returns, The PHA will obtain a completed copy of IRS Form 4506-T to verify that no return has been filed.
- f. For those employed in "gig employment" (i.e., those in formal agreements with on-demand companies such as Uber, Lyft, or DoorDash), the PHA will provide a format for the individual to declare their income and expenses. The PHA will also review the printed statement of monthly income from the applicable app for all hours worked and pay received as well as the Schedule C of the individual's tax return and the corresponding IRS Form 1099 or 1099k.

8) National Standards for the Physical Inspection of Real Estate and Rent Reasonableness Determinations

- a. Housing Quality Standards has been eliminated and replaced with the National Standards for the Physical Inspection of Real Estate (NSPIRE) for short. HAWS may now add additional local requirements only with HUD approval for non-life-threatening conditions. Conditions previously considered life-threatening under the prior Chapter 8 have been incorporated into chapter 8-I.E.

- b. The PHA has adopted biennial inspection scheduling in accordance with HUD permissions.

9) General Leasing Policies

10) Moving with Continued Assistance and Portability

- a. The PHA will approve no extensions to a voucher issued to an applicant or participant family porting out of the PHA's jurisdiction, except under the following circumstances: (a) the initial term of the voucher will expire before the portable family will be issued a voucher by the receiving PHA, (b) the family decides to return to the initial PHA's jurisdiction and search for a unit there, or (c) the family decides to search for a unit in a third PHA's jurisdiction. In such cases, the policies on voucher extensions set forth in Chapter 5, section 5-II.E, of this plan will apply, including the requirement that the family apply for an extension in writing prior to the expiration of the initial voucher term.

11) Annual Reexaminations

- a. Notice PIH 2023-27 changes the conditions under which interim reexaminations must be conducted, codifies when interim reexaminations should be processed and made effective, and requires related changes for annual reexaminations and streamlined income determinations. When the PHA determines that an interim reexamination of income is necessary, they must ask the family to report changes in all aspects of adjusted income.
- b. Families may experience changes within the household that do not trigger an interim reexamination under PHA policy and HUD regulations but which HUD still requires the PHA to report to HUD via Form HUD-50058. These are known as non-interim reexamination transactions. In these cases, PHAs will submit a separate, new action code on Form HUD-50058. HUD has provided an extensive list of new non-interim reexamination transaction in Part IV of this chapter.

12) Termination of Assistance and Tenancy

13) Owners

- a. We must describe how we will conduct owner outreach to ensure owners are familiar with the program and its advantages. NanMcKay's standard policies include two new items:
 - i. Contacting property owners and managers by phone or in-person
 - ii. Holding owner recruitment/information meetings at least once a year
- b. Our policy now indicates that we cannot make any HAP payment for any month after the month the family vacates the unit

14) Program Integrity

- a. The PHA will not be considered out of compliance when making annual income determinations solely due to de minimis errors in calculating family income. A de minimis error is an error where the PHA determination of family income deviates from the correct income determination by no more than \$30 per month in monthly adjusted income (\$360 in annual adjusted income) per family.
- b. PHAs must take corrective action to credit or repay a family if the family was overcharged rent, including when PHAs make de minimis errors in the income determination. Families will not be required to repay the PHA in instances where the PHA miscalculated income resulting in a family being undercharged for rent. PHAs state in their policies how they will repay or credit a family the amount

they were overcharged as a result of the PHA's de minimis error in income determination.

15) Special Housing Types

- a. Unless specifically modified by the regulations, NSPIRE standards apply to special housing types (Single Room Occupancy, Congregate Housing, Group Homes, Shared Housing, Manufactured Homes, Homeownership units) [Notice PIH 2023-28].
- b. Within the Homeownership Option section, NanMckay recommends that we include the following Policy language throughout the section as PHA policies:
 - i. The PHA has instituted a minimum homeowner down payment requirement of at least three percent of the purchase price and requires that at least one percent of the purchase price come from the family's personal resources.
 - ii. The PHA will not establish a higher minimum income standard for disabled and/or non-disabled families.
 - iii. Families will be considered "continuously employed" if the break in employment does not exceed four months.
 - iv. The PHA will count self-employment in a business when determining whether the family meets the employment requirement.
 - v. The PHA will impose additional eligibility requirements. To be eligible to participate in the homeownership option, families must meet the following criteria:
 1. The family has had no family-caused violations of HUD's Housing Quality standards within the past year.
 2. The family is not within the initial one-year period of a HAP Contract.
 3. The family owes no money to the PHA.
 4. The family has not committed any serious or repeated violations of a PHA-assisted lease within the past year.
 - vi. The PHA will administer new homeownership units as desired by participant who are eligible. The PHA may exceed the number of units planned per year if it is necessary as a reasonable accommodation for a person with a disability. If this occurs, the PHA may reduce the number of homeownership units offered in subsequent years.
 - vii. Families who have been participating in an economic self-sufficiency program for at least six months, or have graduated from such a program, will be given preference over other families. Elderly and disabled families will automatically be given this preference.
 - viii. Within preference and non-preference categories, families will be selected according to the date and time their application for participation in the homeownership option is submitted to the PHA.
 - ix. All families must meet eligibility requirements as defined in Section 15-VII.B. of this plan.
 - x. The family will be allowed 120 days to identify a unit and submit a sales contract to the PHA for review. The family will be allowed an additional 120 days to close on the home. PHAs may grant extensions to either of

these periods for good cause. The length of the extension(s) will be determined on a case-by-case, but in no case will an extension exceed a total of 125 days. The maximum amount of time a family will be given to locate and complete the purchase of a home under the homeownership option is 365 days.

- xii. All requests for extensions must be submitted in writing to the PHA prior to the expiration of the period for which the extension is being requested. The PHA will approve or disapprove the extension request within 10 business days. The family will be notified of the PHA's decision in writing.
- xiii. The family will be required to report their progress on locating and purchasing a home to the PHA every 30 days until the home is purchased.
- xiv. If the family cannot complete the purchase of a unit within the maximum required time frame, and is not receiving rental assistance under a HAP contract at the time the search and purchase time period expires, the family will be issued a voucher to lease a unit.
- xv. When the family locates a home they wish to purchase and submits a copy of their purchase offer/contract, the PHA will conduct a NSPIRE inspection within 10 business days. Any items found not to meet NSPIRE must be repaired before the unit can be determined eligible for the homeownership program.
- xvi. The family must hire an independent professional inspector, whose report must be submitted to the PHA for review. This inspector must be a member of the American Society of Home Inspectors (ASHI) or other recognized professional society, or a licensed engineer. The inspector cannot be a PHA employee or contractor.
- xvii. The PHA will review the professional report in a timely fashion and, based on the presence of major physical problems, may disapprove the purchase of the home.
- xviii. If the PHA disapproves the purchase of a home, the family will be notified in writing of the reasons for the disapproval.
- xix. While the family is receiving homeownership assistance, the PHA will conduct an NSPIRE inspection every other year.
- xx. As a check against predatory lending, the PHA will review the financing of each purchase transaction, including estimated closing costs. The PHA will review the loans for features, such as balloon payments, adjustable rate mortgages, and unusually high interest rates, all of which are prohibited. The PHA also will not approve "seller financing" or "owner-held" mortgages. Beyond these basic criteria, the PHA will rely on the lenders to determine that the loan will be affordable to program participants.
- xxi. The mortgage the family applies for must require a minimum down payment of at least three percent of the sales price with one percent of the

down payment coming from the purchaser's personal funds. The PHA will not require that the family have any more than the minimum of one percent of their own money in the transaction. However, in cases where a lender is requiring a larger amount, the family may be held to the underwriting guidelines set by their lending institution.

- xxii. The PHA will approve a family's request to utilize its Family Self-Sufficiency escrow account after final disbursement for down payment and/or closing costs when purchasing a unit under the HCV homeownership option.
- xxiii. The PHA's housing assistance payment will be paid directly to the family. It will be the family's responsibility to make the entire payment to the lender. The PHA may make an exception if the family requests the payment to go directly to the lender, and this arrangement is acceptable to the mortgage company. If the assistance payment exceeds the amount due to the lender, the PHA must pay the excess directly to the family.

16) Program Administration

- a. NanMcKay suggests updating payment standards should include a review of the rent burden of participating families. It would modify our policies to include, along with funding availability, changes in rent to owner, unit availability, lease up-time and success rate, and the quality of units selected, another factor: Rent Burden of Participating Families. Rent burden will be determined by identifying the percentage of families, for each unit size, that are paying more than 30 percent of their monthly adjusted income as the family share. When 40 percent or more of families, for any given unit size, are paying more than 30 percent of adjusted monthly income as the family share, the PHA will consider increasing the payment standard. In evaluating rent burdens, the PHA will not include families renting a larger unit than their family unit size.
- b. The NanMcKay Policy language around Reasonable Accommodation has been modified to include the two following sections in 16-II.c:
 - i. Further, the PHA may grant requests for relief from charges in excess of the utility allowance on reasonable grounds, such as special needs of the elderly, ill, or residents with disabilities, or special factors not within control of the resident, as the PHA deems appropriate. The family must request the higher allowance and provide the PHA with an explanation of the need for the individual relief and information about the amount of additional allowance required [see HCV GB, p. 18-8].
 - ii. PHAs should develop criteria for granting individual relief and to notify residents about the availability of individual relief, and also to notify participants about the availability of individual relief programs (sometimes referred to as "Medical Baseline discounts") offered by the local utility company. Policies for granting exception utility allowances can be found in Section 6-III.D. of this plan.

17) Project Based Vouchers

- a. We moved the section on Continuum of Care Emergency Housing Vouchers to the Special Purpose Voucher's section.

- b. We have modified the policy section of the Preferences portion (Section 17-VI.D) to explicitly include our CNI documents. PBV developments constructed as part of the Choice Neighborhoods Initiative (“CNI”) will provide a preference for families who were relocated out of the Cleveland Avenue Homes public housing community and are applying to the PBV development as a returning family. Please see Exhibits 1 and 2 for a fuller explanation, as fully incorporated herein by reference, of the manner in which the relocation of residents as part of the CNI, will be undertaken. Exhibit 17-1 is now the complete Cleveland Avenue Homes Relocation Plan. Exhibit 17-2 is the Right to Return Policy of the Housing Authority of the City of Winston-Salem.

18) Special Purpose Vouchers

- a. We added a new Part VI (Stability Voucher Program) this year, for a new special voucher type.
- b. We added a new Part VII (Emergency Housing Vouchers) from Continuum of Care in the prior chapter.

19) The Family Self-Sufficiency Program and the FSS Action Plan

20) Purpose, Scope, and Applicability, of the Family Self-Sufficiency Program

21) FSS Program Administration

22) Selecting and Serving FSS Families

23) FSS Contract Participation

24) FSS Escrow Account

25) Portability in Section 8 FSS Programs

Attachment E

ACOP (Admissions and Continued
Occupancy Plan) Outline of Changes
(Full Revised & Board Approved ACOP in
separate attachment)

Memo to Staff
Proposed Changes to the ACO Plan
May 29, 2024
Alexander M. Boston

Changes Listed by Chapter in the Order in which they occur in the Text.

Changes from the Model NMK ACO Plan

- 1) Overview
- 2) Fair Housing & Equal Opportunity
 - a. Upon receipt of a housing discrimination complaint, the PHA is required to:
 - i. Provide written notice of the complaint to those alleged and inform the complainant that such notice was made
 - ii. Investigate the allegations and provide the complainant and those alleged with findings and either a proposed corrective action or an explanation of why corrective action is not warranted
 - iii. Keep records of all complaints, investigations, notices, and corrective actions [Notice PIH 2014-20]
- 3) Eligibility
 - a. To be eligible, now families must meet net asset and property ownership restriction requirements.
- 4) Applications, Waiting List, and Tenant Selection
- 5) Occupancy Standards and Unit Offers
- 6) Income and Rent Determinations.
 - a. The Amounts HUD is required by federal statute to exclude from consideration as income for purposes of determining eligibility or benefits under a category of assistance programs that includes assistance under any program to which the exclusions set forth in 24 CFR 5.609(b) has expanded for the first time since 2014. Among the various payments that must now be excluded from income includes the amount of any refund (or advance payment with respect to a refundable credit) issued under the Internal Revenue Code is excluded from income and assets for a period of 12 months from receipt (26 U.S.C. 6409); funds under reduced-price lunches and food under the Special Supplemental Food Program for Women, Infants, and Children; Payments, including for supportive services and reimbursement of out-of-pocket expenses, for volunteers under the Domestic Volunteer Service Act of 1973 (42 U.S.C. 5044(f)(1), 42 U.S.C. 5058); Any amounts (i) not actually received by the family, (ii) that would be eligible for exclusion under 42 U.S.C. 1382b(a)(7), and (iii) received for service-connected disability under 38 U.S.C. chapter 11 or dependency and indemnity compensation under 38 U.S.C. chapter 13 (25 U.S.C. 4103(9)(C)), and several other new categories of income.
 - b. The Definition of Necessary items of personal property has been expanded to include a car used for commuting or medical devices.

- c. The Total Tenant Payment formula has been altered to include The alternative non-public housing rent, as determined in accordance with 24 CFR 960.102 for over-income families.

7) Verification

- a. HUD published new rules requiring PHAs to comply with the Health Insurance Portability and Accountability Act (HIPAA) and the Privacy Act of 1974. When requesting documentation to determine unreimbursed health and medical care expenses, the PHA may not request documentation beyond what is sufficient to determine anticipated health and medical care costs. Before placing bills and documentation in the tenant file, the PHA must redact all personally identifiable information
- b. New verification sections have been added to comply with HUD policy to provide staff instructions on the verification of net income from rental properties, federal tax refunds or refundable tax credits, retirement accounts, and student financial assistance.
- c. HUD has published new requirements for reviews of Zero Income Status persons which were incorporated into section 7-III.L.
- d. In accordance with PIH Notice 2023-27, If the family declares that it receives irregular or no payments, in addition to the verification process listed above, the family must provide evidence that it has taken all reasonable efforts to collect amounts due. This may include:
 - i. A statement from any agency responsible for enforcing payment that shows the family has requested enforcement and is cooperating with all enforcement efforts
 - ii. If the family has made independent efforts at collection, a written statement from the attorney or other collection entity that has assisted the family in these efforts

8) Leasing & Inspections

- a. The PHA must notify families of HUD NSPIRE inspections.

9) Reexaminations

10) Pets

11) Community Service

- a. Several edits were made specific to over-income families.
- b. The template Community Service and Self-Sufficiency Policy has been updated.

12) Transfer Policy

13) Lease Termination

- a. A new section was added that specified the notice and termination provisions for when terminating a family due to over-income status.
- b. The PHA will terminate the lease additionally for repeated late payment of rent or other charges. Four late payments within a 12-month period shall constitute a repeated late payment.
- c. In all VAWA related sections, “human trafficking” has been added to the list of VAWA related criminal activities.

14) Grievance

15) Program Integrity

16) Program Administration

- a. The review of Utility Allowances has been altered so that now they must include all changes in circumstances (including completion of modernization and/or other energy conservation measures implemented by the PHA) indicating probability of a significant change in reasonable requirements and changes in utility rates [24 CFR 965.507(a)].
- b. Flat Rents provisions have been altered. The 2015 Appropriations Act permits PHAs to apply for an exception flat rent that is lower than either 80 percent of the FMR or SAFMR/unadjusted rent if the PHA can demonstrate, through the submission of a market analysis, that these FMRs do not reflect the market value of a particular property or unit and HUD agrees with the PHA's analysis. Now, all market analysis must be submitted using HUD form 5880.
- c. Reasonable Accommodation and Individual Relief section has been modified to include new notification requirements. PHAs now are instructed to develop criteria for granting individual relief and to notify residents about the availability of individual relief, and also to notify participants about the availability of individual relief programs (sometimes referred to as "Medical Baseline discounts") offered by the local utility company [Utility Allowance GB, p. 19, 24 CFR 965.508].
- d. The Family Debts to the PHA section has been modified. Families are required to reimburse the PHA if they were charged less rent than required because the family either underreported or failed to report income. PHAs are required to determine retroactive rent amounts as far back as the PHA has documentation of family unreported income [Notice PIH 2018-18].

Changes from the 2023 ACO Plan

1) Overview

- a. HUD has modified all inspections standards through the new National Standards for the Physical Inspection of Real Estate (NSPIRE).
- b. Title I of HOTMA contains 14 different sections that impact the public housing and Section 8 programs. The Final Rule implementing broad changes to income and assets in Sections 102 and 104 of HOTMA, and for PHAs that administer the public housing program over-income provisions in Section 103, was officially published in the Federal Register on February 14, 2023. On September 29, 2023, HUD issued notice PIH 2023-27, which provided guidance to PHAs on the implementation of the program changes described in the Final Rule.

2) Fair Housing & Equal Opportunity

- a. HAWS has expended the Limited English Proficiency Language Action Plan in line with the new guidance provided by PIH Notice 2024-04

3) Eligibility

- a. HAWS has modified the eligibility standards so that applicants must meet net asset and property ownership restriction requirements under 24 CFR 5.618.
- b. New provisions have been added defining the terms "foster adult" and "foster child."
- c. HUD instituted at 24 CFR 5.232 new consent regulations regarding the release of information to HAWS. These regulations require that consent forms remain

effective until the family is denied assistance, assistance is terminated, or the family provides written notification to revoke consent.

- 4) Applications, Waiting List, and Tenant Selection
- 5) Occupancy Standards and Unit Offers
- 6) Income and Rent Determinations
 - a. HOTMA removed the statutory authority for the EID. The EID is available only to families that are eligible for and participating on the program as of December 31, 2023, or before; no new families may be added on or after January 1, 2024. If a family is receiving the EID prior to or on the effective date of December 31, 2023, they are entitled to the full amount of the benefit for a full 24-month period. The policies below are applicable only to such families. No family will still be receiving the EID after December 31, 2025. The EID will sunset on January 1, 2026, and the PHA policies below will no longer be applicable as of that date or when the last qualifying family exhausts their exclusion period, whichever is sooner.
 - b. The PHA may grant requests for relief from charges in excess of the utility allowance on reasonable grounds, such as special needs of the elderly, ill, or residents with disabilities, or special factors not within control of the resident, as the PHA deems appropriate. The family must request the higher allowance and provide the PHA with an explanation about the additional allowance required.
 - c. If a PHA is to so grant such relief on a basis other than as a reasonable accommodation, the PHAs should develop criteria for granting individual relief, notify residents about the availability of individual relief, and notify participants about the availability of individual relief programs (sometimes referred to as “Medical Baseline discounts”) offered by the local utility company [Utility Allowance GB, p. 19; 24 CFR 965.508].
 - d. HUD has promulgated guidance with regards to several forms of income, including state payments to allow individuals with disabilities to live at home, nonrecurring income, retirement accounts, periodic payments, student financial assistance, civil rights settlements, and several other exclusion categories.
 - e. New regulations require the PHA to alter their process for determining the amount of the reasonable accommodation or individual relief. To arrive at the amount of additional utility cost of specific equipment, the family may provide information from the manufacturer of the equipment, or the family or PHA may conduct an internet search for an estimate of usage or additional monthly cost. The family must request the higher allowance and provide the PHA with information about the amount of additional allowance required. At its discretion, the PHA may reevaluate the need for the increased utility allowance as a reasonable accommodation at any regular reexamination. If the excessive consumption is caused by a characteristic of the unit or PHA-supplied equipment that is beyond the family’s control, such as a particularly inefficient refrigerator or inadequate insulation, the individual relief to the resident will cease when the situation is remedied. The PHA will consider only the following criteria as valid reasons for granting individual relief:
 - i. The family’s consumption was mistakenly portrayed as excessive due to defects in the meter or errors in the meter reading.

- ii. The excessive consumption is caused by a characteristic of the unit or owner-supplied equipment that is beyond the family's control, such as a defective appliances or inadequate insulation, and for which the family informed the PHA in a reasonable time. The allowance should be adjusted to reflect the higher consumption needs associated with the unit until the situation is remedied. The resident should be granted individual relief until the allowance is adjusted.
- iii. The excessive consumption is due to special needs of the family that are beyond their control, such as the need for specialized equipment in the case of a family member who is ill, elderly, or who has a disability.
- f. Hardship exemptions have expanded and been altered to reflect new changes in the manner of phasing in relief.
- g. The PHA has adopted HUD's Safe Harbor determinations for income already verified by another public entity (e.g., DSS).

7) Verification

- a. New Consent Form verification regulations have been promulgated through a new HUD form -9886 and PIH Notice 2023-27. This requires all applicants and tenant to sign HUD-9886. It also allows expanded use of income determinations from other programs for use in the Public Housing program.
- b. Streamlined Income Determinations have expanded, reflecting changes to 24 CFR 960.257(c).
- c. The Verification Hierarchy has been dramatically revised in line with PIH Notice 2023-27. This includes that now if the family cannot provide original documents, the PHA will pay the service charge required to obtain third-party verification, unless it is not cost effective in which case a self-certification will be acceptable as the only means of verification. The cost of verification will not be passed on to the family.
- d. The cost of postage and envelopes to obtain third-party verification of income, assets, and expenses is not an unreasonable cost [VG, p. 18].
- e. Now, annual income includes "all amounts received," not the amount that a family may be legally entitled to receive but which they do not receive. For example, a family's child support or alimony income must be based on payments received, not the amounts to which the family is entitled by court or agency orders.
- f. HUD has instituted new rules regarding self-certification of real property owners among PH residents and applicants.
- g. With regards to Health and Medical Care Expense Deductions, now we must comply with the Health Insurance Portability and Accountability Act (HIPAA) (Pub. L. 104-191, 110 Stat. 1936) and the Privacy Act of 1974 (Pub. L. 93-579, 88 Stat. 1896) when requesting documentation to determine unreimbursed health and medical care expenses. We may not request documentation beyond what is sufficient to determine anticipated health and medical care costs. Before placing bills and documentation in the tenant file, the PHA must redact all personally identifiable information [FR Notice 2/14/23].

8) Leasing & Inspections

- a. The PHA may grant requests for relief from surcharges from excess utility consumption of PHA-furnished utilities as a reasonable accommodation where the PHA deems an exception is appropriate to meet the needs of elderly, ill, or disabled residents. In determining whether to grant this request, the PHA will consider special factors affecting utility usage that are not within the control of the resident, such as the need for medical equipment. Residents may request relief in accordance with Section 2-II.C. of this ACOP. The PHA will process such requests in accordance with Section 2-II.E. of this ACOP
 - b. HUD has changed fundamentally the regulations around inspections. HQS is no longer in use. NSPIRE is the new acronym for the National Standards for the Physical Inspection of Real Estate.
 - c. The PHA will now undertake biennial inspections protocols, in accordance with HUD's permissions.
- 9) Reexaminations
 - a. A new Part V has been added to the chapter describing the procedures and policy for non-interim reexamination transactions that do not entail any changes to the family's adjusted income.
 - b. The HOTMA provisions reshape the manner in which we calculate annual income at annual reexaminations. New regulatory language has entirely replaced section 9-I.D.
 - c. Over-Income families must abide by distinct over-income reexamination rules under PIH Notice 2023-03.
 - d. New regulations provide rules for when a family may request an interim redetermination of family income under 24 CFR 960.257(b)(2) for an increase or decrease in family income.
- 10) Pets
 - a. New guidance has been produced regarding proof of training or certification as well as the circumstances under which a PHA may deny a request for a service animal.
- 11) Community Service
 - a. The Community Service and Self-Sufficiency Policy is expanded.
- 12) Transfer Policy
- 13) Lease
 - a. New provisions have been included regarding notification on over-income status due to PIH Notice 2023-27. Exhibits of template notices for over-income families are attached.
- 14) Grievances and Appeals
- 15) Program Integrity
 - a. The PHA will not be considered out of compliance when making annual income determinations solely due to de minimis errors. Qualifications for "de minimis" as well as PHA corrective action requirements, are described in more detail in 15-II.C.
- 16) Program Administration
 - a. Families are required to reimburse the PHA if they were charged less rent than required because the family either underreported or failed to report income. PHAs

are required to determine retroactive rent amounts as far back as the PHA has documentation of family unreported income [Notice PIH 2018-18].

- b. The PHA must maintain Enterprise Income Verification (EIV) system Income Reports in the tenant file for the duration of the tenancy but for a period not to exceed three years from the EOP date [Notice PIH 2018-18].

Attachment F

VAWA

PHA STATEMENT REGARDING VIOLENCE AGAINST WOMEN ACT

Summary:

Battered women, and to a much lesser degree, battered men, and their families across the country are being discriminated against, denied access to, and even evicted from public, subsidized, and private housing because of their status as victims of domestic violence, stalking, sexual assault, or dating violence perpetrated against them. Due to these situations, the Violence Against Women Act (VAWA) was signed into law on January 5, 2006. VAWA ensures that female and male victims have access to the criminal justice system without jeopardizing their current or future housing. The PHA will not deny or terminate assistance to an individual solely on the basis or as the direct result of that individual being a victim of domestic violence, dating violence, stalking, or sexual assault or being in a household where an affiliated individual is a victim of domestic violence, dating violence, stalking, or sexual assault.

Goals, Objectives and Policies:

The Housing Authority of the City of Winston-Salem has notified all tenants of public housing and participants in the HCV program of their rights under VAWA. PHA will provide a Notice of Occupancy Rights, Emergency Transfer Request Form, and a Domestic Violence Certification form at all required times. The PHA shall allow a family to move when they satisfy VAWA requirements as expressed in the Emergency Transfer Plan of any covered housing provider. An actual or threatened incident or incidents against a covered individual, or any affiliated individual who is not the perpetrator, of domestic violence, dating violence, or stalking will not be construed as serious or repeated violations of the lease or other "good cause" for termination of the lease or assistance of such a victim. Criminal activity directly relating to abuse, engaged in by a member of a tenant's household or any guest or other person under the tenant's control shall not be cause for termination of the lease or assistance if the tenant or an immediate member of the tenant's family is the victim or threatened victim of domestic, dating violence or stalking.

When responding to an incident or incidents of actual or threatened domestic violence or stalking that may affect a tenant's participation in a housing program, the Authority will request in writing that an individual complete, sign and submit, within 14 business days of the request:

1. form HUD-50066 Certification of Violence, Dating violence or Stalking, or
2. a self-certification that he/she is a victim of domestic violence, dating violence, or stalking, and that the incident or incidences in question are bona fide incidences of such actual or threatened abuse.

In addition, the tenant may, but may not be required to provide:

1. a federal, state, or local police record or court record, and/or
2. documentation signed and attested to by an employee, agent or volunteer of a victim service provider, an attorney or a medical professional, from which the victim has sought assistance in addressing domestic violence, dating violence or stalking, or the effects of abuse.

If an individual does not provide the form HUD-50066, certification, and/or required documentation by the 14th business day (or any approved extension), none of the VAWA protections afforded to the victim of domestic violence, dating violence or stalking will apply.

Notwithstanding any restrictions on admission, occupancy, or terminations of occupancy or assistance, or any Federal, State or local law to the contrary, the Authority may "bifurcate" a lease, or otherwise remove a

household member from a lease, without regard to whether a household member is a signatory to the lease, in order to evict, remove termination occupancy rights, or terminate assistance to any individual who is a tenant or lawful occupant and who engages in criminal acts of physical violence against family members or others. This action may be taken without evicting, removing, terminating assistance to, or otherwise penalizing the victim of the violence who is also a tenant or lawful occupant. Such eviction, removal, termination of occupancy rights, or termination of assistance shall be effective in accordance with the procedures prescribed by Federal, State, and local law for the termination of leases or assistance.

Nothing in this policy may be construed to limit the Authority to evict, or terminate assistance if it can demonstrate an actual and imminent threat to other tenants or those employed at or providing service to the property if the tenant is not evicted or terminated from assistance. Actual and imminent threat is defined as physical danger that is real, would occur within an immediate time frame, and could result in death or serious bodily harm. In determining whether an individual would pose an actual and imminent threat, the factors to be considered include: The duration of the risk, the nature and severity of the potential harm, the likelihood that the potential harm will occur, and the length of time before the potential harm would occur.

Attachment G
Resident Advisory Board Meeting
May 30, 2024

Attachment H
Challenged Elements of the PHA Annual
Plan

Challenged Elements of the PHA Annual Plan

No Elements of the PHA Annual Plan were challenged.

Attachment I

Capital Fund Program Five-Year Action Plan

Capital Fund Program - Five-Year Action Plan

Status: Approved Approval Date: 04/20/2023 Approved By: ROMAN-CINTRON, HIRAM

Part I: Summary		Locality (City/County & State)				
PHA Name : Housing Authority of the City of Winston-Salem		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revised 5-Year Plan (Revision No:)				
PHA Number: NC012						
A.	Development Number and Name	Work Statement for Year 1 2023	Work Statement for Year 2 2024	Work Statement for Year 3 2025	Work Statement for Year 4 2026	Work Statement for Year 5 2027
	AUTHORITY-WIDE	\$1,455,365.00	\$1,455,365.00	\$1,455,365.00	\$1,455,365.00	\$1,405,365.00
	PIEDMONT PARK (NC012000003)	\$872,910.00	\$1,152,553.00	\$1,061,338.00	\$1,225,536.70	\$2,622,607.00
	SUNRISE TOWERS (NC012000008)	\$453,197.00	\$550,054.00	\$605,000.00	\$576,301.30	
	CRYSTAL TOWERS (NC012000009)	\$170,000.00	\$775,000.00	\$796,000.00	\$479,769.00	
	HEALY DRIVE TOWERS (NC012000012)	\$675,000.00	\$95,000.00		\$95,000.00	
	TOWN VIEW APARTMENTS (NC012000021)	\$251,000.00		\$110,269.00		
	THE OAKS AT TENTH (NC012000037)	\$110,000.00			\$50,000.00	
	STONEY GLEN APARTMENTS (NC012000022)	\$8,500.00			\$50,000.00	
	CAMDEN STATION (NC012000038)				\$96,000.00	
	CLEVELAND AVENUE HOMES (NC012000006)	\$32,000.00				

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)

Work Statement for Year 1 2023

Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	AUTHORITY-WIDE (NAWASD)			\$1,453,365.00
ID0004	Operations(Operations (1406))	Transfer to Operations		\$1,003,832.00
ID0009	Management Improvements(Management Improvement (1408)-Other)	Management Improvements		\$50,000.00
ID0014	Administration(Administration (1410)-Salaries)	Administration		\$401,533.00
	PIEDMONT PARK (NC012000003)			\$872,910.00
ID0019	Roofing and Guttering(Contract Administration (1480)-Other Fees and Costs,Dwelling Unit-Development (1480)-Other,Dwelling Unit-Exterior (1480)-Roofs)	Roofing and Guttering - 29 buildings		\$660,269.00
ID0040	TreeWork(Non-Dwelling Site Work (1480)-Landscape)	Remove or prune 10 trees		\$75,000.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)					
Work Statement for Year		1	2023		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
ID0041	HVAC(Dwelling Unit-Exterior (1480)-Other)	HVAC Replacements 25 units			\$137,641.00
	SUNRISE TOWERS (NCU12000008)				\$453,197.00
ID0042	Electric Baseboard Heaters(Dwelling Unit-Interior (1480)-Electrical)	Electric Baseboard Heaters - 195 units			\$325,000.00
ID0043	Lobby/Community Room Upgrade(Non-Dwelling Interior (1480)-Common Area Finishes)	Lobby/Community Room Upgrade - 1			\$128,197.00
	CRYSTAL TOWERS (NCU12000009)				\$170,000.00
ID0044	Central Vent and Exhaust(Dwelling Unit-Exterior (1480)-Other)	Central Vent and Exhaust - 1			\$85,000.00
ID0045	Lobby Upgrade(Non-Dwelling Interior (1480)-Common Area Finishes)	Lobby Upgrade			\$85,000.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)					
Work Statement for Year		1	2023		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
	HEALY DRIVE TOWERS (NC01200012)				\$675,000.00
ID0046	Elevator Replacement(Non-Dwelling Interior (1480)-Other)	Elevator Replacement - 2			\$675,000.00
	STONEY GLEN APARTMENTS (NC012000022)				\$8,500.00
ID0047	Tree work(Non-Dwelling Site Work (1480)-Landscape)	Treework			\$8,500.00
	THE OAKS AT TENTH (NC012000037)				\$110,000.00
ID0048	Window Shades(Dwelling Unit-Interior (1480)-Other)	Window Shades 50 units			\$110,000.00
	TOWN VIEW APARTMENTS (NC012000021)				\$251,000.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)					
Work Statement for Year		1	2023		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
ID0049	Hot Water Heaters(Dwelling Unit-Interior (1480)-Other)	Hot Water Heaters - 25			\$251,000.00
	CLEVELAND AVENUE HOMES (NC012000006)				\$32,000.00
ID0050	HVAC Replacement(Dwelling Unit-Exterior (1480)-Other)	HVAC Replacement - 5			\$32,000.00
	Subtotal of Estimated Cost				\$4,027,972.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)					
Work Statement for Year		2	2024		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
	AUTHORITY-WIDE (NAWASD)				\$1,455,365.00
ID0005	Operations(Operations (1406))	Transfer to Operations			\$1,003,832.00
ID0010	Management Improvements(Management Improvement (1408)-Other)	Management Improvements			\$50,000.00
ID0015	Administration(Administration (1410)-Salaries)	Administration			\$401,533.00
	PIEDMONT PARK (NC012000003)				\$1,152,553.00
ID0020	Window Replacements(Contract Administration (1480)-Other Fees and Costs,Dwelling Unit-Development (1480)-Other,Dwelling Unit-Exterior (1480)-Windows)	Window Replacement 2017 windows			\$159,343.00
ID0051	HVAC(Dwelling Unit-Exterior (1480)-Other)	HVAC Replacement 25 units			\$137,641.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 2		2024		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0052	Sanitary Sewers(Non-Dwelling Site Work (1480)-Site Utilities)	Sanitary Sewers 3100 units		\$195,300.00
ID0053	Roofs and Gutters(Dwelling Unit-Exterior (1480)-Roofs,Dwelling Unit-Exterior (1480)-Gutters - Downspouts)	Roofs and Gutters 29 units		\$660,269.00
	SUNRISE TOWERS (NC012000008)			\$550,054.00
ID0054	Flooring Resilient(Dwelling Unit-Interior (1480)-Flooring (non routine))	Flooring Resilient 95 units		\$375,054.00
ID0055	Refrigerator Replacement(Dwelling Unit-Interior (1480)-Appliances)	Refrigerator Replacement 195 units		\$175,000.00
	CRYSTAL TOWERS (NC012000009)			\$775,000.00
ID0056	Elevator Replacement(Non-Dwelling Interior (1480)-Other)	Elevator Replacement		\$775,000.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)

Work Statement for Year 2 2024				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	HEALY DRIVE TOWERS (NC012000012)			\$95,000.00
ID0057	Ranges and Stoves(Dwelling Unit-Interior (1480)-Appliances)	Ranges and Stoves 53 units		\$95,000.00
	Subtotal of Estimated Cost			\$4,027,972.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)					
Work Statement for Year		3	2025		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost	
	AUTHORITY-WIDE (NAWASD)			\$1,455,365.00	
ID0021	Operations(Operations (1406))	Operations		\$1,003,832.00	
ID0022	Management Improvements(Management Improvement (1408)-Other)	Management Improvements		\$50,000.00	
ID0023	Administration(Administration (1410)-Other)	Administration		\$401,533.00	
	PIEDMONT PARK (NC012000003)			\$1,061,338.00	
ID0024	Sanitary Sewers(Contract Administration (1480)-Other Fees and Costs,Dwelling Unit-Development (1480)-Other,Dwelling Unit-Site Work (1480)-Other)	Sanitary Sewers 3100		\$195,300.00	
ID0058	HVAC Replacement(Dwelling Unit-Exterior (1480)-Other)	HVAC Replacement 94 units		\$578,038.00	

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)

Work Statement for Year 3 2025

Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0059	Bathubs(Dwelling Unit-Interior (1480)-Tubs and Showers)	Bathubs 240 units		\$288,000.00
	SUNRISE TOWERS (NC012000008)			\$605,000.00
ID0060	Automatic Entry Door(Non-Dwelling Exterior (1480)-Doors)	Automatic Entry Door		\$80,000.00
ID0061	Windows(Dwelling Unit-Exterior (1480)-Windows)	Windows 6508 units		\$525,000.00
	CRYSTAL TOWERS (NC012000009)			\$796,000.00
ID0062	PTAC Units(Dwelling Unit-Interior (1480)-Other)	PTAC Units 134		\$250,000.00
ID0063	Replace Refrigerators(Dwelling Unit-Interior (1480)-Appliances)	Replace Refrigerators 201 units		\$171,000.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)					
Work Statement for Year		3	2025		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
ID0064	Cabinets and Countertops(Dwelling Unit-Interior (1480)-Kitchen Cabinets)	Cabinets and Countertops 201 units			\$375,000.00
	TOWN VIEW APARTMENTS (NC012000021)				\$110,269.00
ID0065	Hot Water Heaters(Dwelling Unit-Interior (1480)-Other)	Hot Water Heaters 50 units			\$110,269.00
	Subtotal of Estimated Cost				\$4,027,972.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)					
Work Statement for Year		4	2026		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
	AUTHORITY-WIDE (NAWASD)				\$1,455,365.00
ID0025	Operations(Operations (1406))	Operations			\$1,003,832.00
ID0026	Administration(Administration (1410)-Other)	Administration			\$401,533.00
ID0027	Management Improvements(Management Improvement (1408)-Other)	Management Improvements			\$50,000.00
	THE OAKS AT TENTH (NC012000037)				\$50,000.00
ID0028	Grounds(Contract Administration (1480)-Other Fees and Costs,Dwelling Unit-Development (1480)-Other,Dwelling Unit-Site Work (1480)-Other)	Grounds work			\$50,000.00
	PIEDMONT PARK (NC012000003)				\$1,225,536.70

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (\$)				
Work Statement for Year		4	2026	
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0066	Refrigerators(Dwelling Unit-Interior (1480)-Appliances)	Replace Refrigerators 240		\$204,000.00
ID0067	HVAC Replacement(Dwelling Unit-Exterior (1480)-Other)	HVAC Replacements 125 units		\$655,536.70
ID0068	Ground Improvements(Dwelling Unit-Site Work (1480)-Other)	Ground Improvements 22500 sq ft		\$150,000.00
ID0069	Stormdoors and handrails(Dwelling Unit-Exterior (1480)-Balconies-Porches-Railings-etc.Dwelling Unit-Exterior (1480)-Exterior Doors)	Stormdoors and handrails 488 units		\$216,000.00
	SUNRISE TOWERS (NC012000008)			\$576,301.30
ID0070	Parking Lot(Non-Dwelling Site Work (1480)-Asphalt - Concrete - Paving)	Parking Lot 27043 sq ft		\$45,000.00
ID0071	Flooring Resilient(Dwelling Unit-Interior (1480)-Flooring (non routine))	Flooring Resilient 95 units		\$356,301.30

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year		4	2026	
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0072	Building Membrane(Dwelling Unit-Exterior (1480)-Other)	Building Membrane		\$175,000.00
	CRYSTAL TOWERS (NC012000009)			\$479,769.00
ID0073	Parking Lot(Dwelling Unit-Site Work (1480)-Parking)	Parking Lot 29500 sq ft		\$39,500.00
ID0074	Building Membrane(Dwelling Unit-Exterior (1480)-Other)	Building Membrane		\$185,269.00
ID0075	Generator(Non-Dwelling Exterior (1480)-Other)	Generator		\$255,000.00
	HEALY DRIVE TOWERS (NC012000012)			\$95,000.00
ID0076	Ranges and Stoves(Dwelling Unit-Interior (1480)-Appliances)	Ranges and Stoves 53 units		\$95,000.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (S)

Work Statement for Year 4 2026

Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	STONEY GLEN APARTMENTS (NC01200022)			\$50,000.00
ID0077	Trees and Grounds(Dwelling Unit-Site Work (1480)-Other)	Trees and Grounds 98000 sqft		\$50,000.00
	CAMDEN STATION (NC01200038)			\$96,000.00
ID0078	Exterior Painting(Dwelling Unit-Exterior (1480)-Other)	Exterior Painting		\$96,000.00
	Subtotal of Estimated Cost			\$4,027,972.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)					
Work Statement for Year		5	2027		
Identifier	Development Number/Name	General Description of Major Work Categories		Quantity	Estimated Cost
	AUTHORITY-WIDE (NAWASD)				\$1,405,365.00
ID0079	Operations(Operations (1406))	Operations			\$1,003,832.00
ID0080	Administration(Administration (1410)-Salaries)	Administration			\$401,533.00
	PIEDMONT PARK (NC012000003)				\$2,622,607.00
ID0081	Roofs and Gutters(Dwelling Unit-Exterior (1480)-Other)	Replace roofs and gutters			\$2,622,607.00
	Subtotal of Estimated Cost				\$4,027,972.00

Capital Fund Program - Five-Year Action Plan

Part III: Supporting Pages - Management Needs Work Statements (s)		
Work Statement for Year	2023	
Development Number/Name	General Description of Major Work Categories	Estimated Cost
Housing Authority Wide		
Operations(Operations (1406))		\$1,003,832.00
Management Improvements(Management Improvement (1408)-Other)		\$50,000.00
Administration(Administration (1410)-Salaries)		\$401,533.00
Subtotal of Estimated Cost		\$1,455,365.00

Capital Fund Program - Five-Year Action Plan

Part III: Supporting Pages - Management Needs Work Statements (s)		
Work Statement for Year	Development Number/Name General Description of Major Work Categories	Estimated Cost
2024	Housing Authority Wide	
	Operations(Operations (1406))	\$1,003,832.00
	Management Improvements(Management Improvement (1408)-Other)	\$50,000.00
	Administration(Administration (1410)-Salaries)	\$401,533.00
	Subtotal of Estimated Cost	\$1,455,365.00

Capital Fund Program - Five-Year Action Plan

Part III: Supporting Pages - Management Needs Work Statements (\$)		
Work Statement for Year	2025	
Development Number/Name General Description of Major Work Categories		Estimated Cost
Housing Authority Wide		
Operations(Operations (1406))		\$1,003,832.00
Management Improvements(Management Improvement (1408)-Other)		\$50,000.00
Administration(Administration (1410)-Other)		\$401,533.00
Subtotal of Estimated Cost		\$1,455,365.00

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 2577-0274
 02/28/2022

Part III: Supporting Pages - Management Needs Work Statements (\$)

Work Statement for Year 4 2026

Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Operations(Operations (1406))	\$1,003,832.00
Administration(Administration (1410)-Other)	\$401,533.00
Management Improvements(Management Improvement (1408)-Other)	\$50,000.00
Subtotal of Estimated Cost	\$1,455,365.00

Capital Fund Program - Five-Year Action Plan

Part III: Supporting Pages - Management Needs Work Statements (s)		
Work Statement for Year	Development Number/Name General Description of Major Work Categories	Estimated Cost
5	Housing Authority Wide	
2027	Operations(Operations (1406))	\$1,003,832.00
	Administration(Administration (1410)-Salaries)	\$401,533.00
	Subtotal of Estimated Cost	\$1,405,365.00

Public Hearing



PO Box 27283
Richmond, VA 23261-7283

Order Confirmation

Order# 0000865173

Client: HOUSING AUTHORITY OF WINSTON-SALEM
Phone: 3367278500

Payor : HOUSING AUTHORITY OF WINSTON-SALEM
Phone: 3367278500

Account: 3226444
Address: ATTN: ACCOUNTS PAYABLE
WINSTON SALEM NC 27101

Account: 3226444
Address: ATTN: ACCOUNTS PAYABLE
WINSTON SALEM NC 27101

Sales Rep **Acct Rep** **Ordered By**
aboan aboanwsj Fanita

Fax:
EMail: rchambers@haws.org

Total Amount \$329.50

Payment Amount \$0.00

Amount Due \$329.50

Tear Sheets **Proofs** **Affidavits** **PO Number:**

Tax Amount: 0.00

Payment Meth: Invoice - Statement

1 0 1

Ad Number **Ad Type** **Ad Size** **Color**
0000865173-01 CLS Legal 2 X 25 li \$0.00

Production Method
AdBooker (liner)

Production Notes

Product and Zone **Placement** **Position** **# Inserts**
WSJ Winston-Salem Jn C-Legal Ads Legal Notices 1
Run Schedule Invoice Text: Public Hearing Notice HOUSING AUTHORITY OF THE CITY
Run Dates 4/ 1/2024

Product and Zone **Placement** **Position** **# Inserts**
WSJ Online C-Legal Ads Legal Notices 1
Run Schedule Invoice Text: Public Hearing Notice HOUSING AUTHORITY OF THE CITY
Run Dates 4/ 1/2024

TagLine: PUBLICHEARINGNOTICEHOUSINGAUTHORITYOFTHECITYOFWINSTONSALEMPHAPUBLICHOUSINGAUT
HORITYPLANANNUALPLANFORYEAR20242025ANDFIVEYEARPLAN101



Order Confirmation

Order# 0000865173

PO Box 27283
Richmond, VA 23261-7283

Ad Content Proof

Note: Ad size does not reflect actual ad

Public Hearing Notice

HOUSING AUTHORITY OF THE CITY OF WINSTON-SALEM PHA (PUBLIC HOUSING AUTHORITY) PLAN ANNUAL PLAN FOR YEAR 2024-2025 and Five-Year Plan (10/1/24-9/30/25) 2024-2029

The Housing Authority of the City of Winston-Salem hereby gives notice of a Public Hearing for the PHA Plan. The purpose of the public hearing is to receive comments from all interested parties.

**The public hearing is scheduled on
Thursday, May 30, 2024
The Housing Authority of Winston-Salem
3rd Floor Conference Room
500 West 4th Street, Suite 300
12:00 p.m.**

Draft copies of the proposed plans will be available to be mailed or emailed by contacting Kelly Church at 336-917-6087 by May 27, 2024.

We encourage participants to select a spokesperson to present the comments and/or concerns of a particular group which share the same concern. A sign-up for speakers will be available fifteen minutes prior to the start of the meeting. You will be given three (3) minutes to voice your comments.

WSJ: April 1, 2024.

HUD-50077-SL Certification

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

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

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

I, Patrick Pate, the City Manager
Official's Name *Official's Title*

certify that the 5-Year PHA Plan for fiscal years _____ and/or Annual PHA Plan for fiscal
 year 2024-2025 of the City of Winston-Salem is consistent with the
The Housing Authority of the City of Winston-Salem

Consolidated Plan or State Consolidated Plan including the Analysis of Impediments (AI) to Fair
 Housing Choice or Assessment of Fair Housing (AFH) as applicable to the

Winston-Salem/Forsyth Housing Consortium
Local Jurisdiction Name

pursuant to 24 CFR Part 91 and 24 CFR §§ 903.7(o)(3) and 903.15.

Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or
 State Consolidated Plan.

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

Name of Authorized Official:	Title:
Patrick Pate	City Manager
Signature:	Date:

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

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

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

The PHA Annual Plan is consistent with Consolidated Plan Strategy 1.3 (Rehabilitate Multi-Family and Single-Family Substandard Rental Housing), Strategy 2.3 (Subsidize Affordable Rental Housing), Strategy 3.1 (Meet the Housing and Service Needs of Homeless Persons) and Strategy 5.1 Strengthen Coordination and Partnerships. The PHA participated in development of the Assessment of Fair Housing per the Affirmatively Furthering Fair Housing Final Rule.

HUD-50077-ST-HCV-HP

**Certifications of Compliance with
PHA Plan and Related Regulations
(Standard, Troubled, HCV-Only, and
High Performer PHAs)**

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
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**PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations
including PHA Plan Elements that Have Changed**

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairperson or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the ___ 5-Year and/or x Annual PHA Plan, hereinafter referred to as "the Plan", of which this document is a part, and make the following certification and agreements with the Department of Housing and Urban Development (HUD) for the PHA fiscal year beginning 2024/2025, in connection with the submission of the Plan and implementation thereof:

1. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located (24 CFR § 91.2).
2. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments (AI) to Fair Housing Choice, or Assessment of Fair Housing (AFH) when applicable, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan (24 CFR §§ 91.2, 91.225, 91.325, and 91.425).
3. The PHA has established a Resident Advisory Board or Boards, the membership of which represents the residents assisted by the PHA, consulted with this Resident Advisory Board or Boards in developing the Plan, including any changes or revisions to the policies and programs identified in the Plan before they were implemented, and considered the recommendations of the RAB (24 CFR 903.13). The PHA has included in the Plan submission a copy of the recommendations made by the Resident Advisory Board or Boards and a description of the manner in which the Plan addresses these recommendations.
4. The PHA provides assurance as part of this certification that:
 - (i) The Resident Advisory Board had an opportunity to review and comment on the changes to the policies and programs before implementation by the PHA;
 - (ii) The changes were duly approved by the PHA Board of Directors (or similar governing body); and
 - (iii) The revised policies and programs are available for review and inspection, at the principal office of the PHA during normal business hours.
5. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 45 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
6. The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d-2000d-4), the Fair Housing Act (42 U.S.C. 3601-19), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), title II of the Americans with Disabilities Act (42 U.S.C. 12101 et seq.), and other applicable civil rights requirements and that it will affirmatively further fair housing in the administration of the program. In addition, if it administers a Housing Choice Voucher Program, the PHA certifies that it will administer the program in conformity with the Fair Housing Act, title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, title II of the Americans with Disabilities Act, and other applicable civil rights requirements, and that it will affirmatively further fair housing in the administration of the program.
7. The PHA will affirmatively further fair housing, which means that it will take meaningful actions to further the goals identified in the Assessment of Fair Housing (AFH) conducted in accordance with the requirements of 24 CFR § 5.150 through 5.180, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR § 903.7(o)(3). The PHA will fulfill the requirements at 24 CFR § 903.7(o) and 24 CFR § 903.15(d). Until such time as the PHA is required to submit an AFH, the PHA will fulfill the requirements at 24 CFR § 903.7(o) promulgated prior to August 17, 2015, which means that it examines its programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintains records reflecting these analyses and actions.
8. For PHA Plans that include a policy for site-based waiting lists:
 - The PHA regularly submits required data to HUD's 50058 PIC/IMS Module in an accurate, complete and timely manner (as specified in PIH Notice 2011-65);

- The system of site-based waiting lists provides for full disclosure to each applicant in the selection of the development in which to reside, including basic information about available sites; and an estimate of the period of time the applicant would likely have to wait to be admitted to units of different sizes and types at each site;
 - Adoption of a site-based waiting list would not violate any court order or settlement agreement or be inconsistent with a pending complaint brought by HUD;
 - The PHA shall take reasonable measures to assure that such a waiting list is consistent with affirmatively furthering fair housing; and
 - The PHA provides for review of its site-based waiting list policy to determine if it is consistent with civil rights laws and certifications, as specified in 24 CFR 903.7(o)(1).
9. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
 10. In accordance with 24 CFR § 5.105(a)(2), HUD's Equal Access Rule, the PHA will not make a determination of eligibility for housing based on sexual orientation, gender identify, or marital status and will make no inquiries concerning the gender identification or sexual orientation of an applicant for or occupant of HUD-assisted housing.
 11. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
 12. The PHA will comply with the requirements of Section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
 13. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
 14. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
 15. The PHA will provide the responsible entity or HUD any documentation that the responsible entity or HUD needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58 or Part 50, respectively.
 16. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under Section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
 17. The PHA will keep records in accordance with 2 CFR 200.333 and facilitate an effective audit to determine compliance with program requirements.
 18. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act, the Residential Lead-Based Paint Hazard Reduction Act of 1992, and 24 CFR Part 35.
 19. The PHA will comply with the policies, guidelines, and requirements of 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Financial Assistance, including but not limited to submitting the assurances required under 24 CFR §§ 1.5, 3.115, 8.50, and 107.25 by submitting an SF-424, including the required assurances in SF-424B or D, as applicable.
 20. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the regulations and included in its Plan.
 21. All attachments to the Plan have been and will continue to be available at all times and all locations that the PHA Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its PHA Plan and will continue to be made available at least at the primary business office of the PHA.
 22. The PHA certifies that it is in compliance with applicable Federal statutory and regulatory requirements, including the Declaration of Trust(s).

The Housing Authority of the City of Winston-Salem NC012
 PHA Name PHA Number/HA Code

x Annual PHA Plan for Fiscal Year 2024-25
 _____ 5-Year PHA Plan for Fiscal Years 20____ - 20_____

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

Name of Executive Director Kevin Cheshire		Name Board Chairman Andrew M. Perkins, Jr.	
Signature	Date	Signature	Date

RESOLUTION NO. 2250

**AUTHORIZING ACQUISITION MEMBERSHIP INTEREST IN HHG III, LLC FROM
RAYMOND JAMES AFFORDABLE HOUSING FUND 6 L.L.C.**

WHEREAS, Forsyth Real Estate Development, LLC, a North Carolina limited liability company (“FRED”), is the managing member and Raymond James Affordable Housing Fund 6 L.L.C., a Delaware limited liability company (“Raymond James”), is the investor member of HHG III, LLC, a North Carolina limited liability company (the “Company”), pursuant to that certain Amended and Restated Operating Agreement, dated June 1, 2006, as amended (the “Agreement”); and

WHEREAS, the Company owns an apartment complex known as Willows Peake Apartments (the “Project”), which qualified for low income housing tax credits under Section 42 of the Internal Revenue Code of 1986 (the “Code”); and

WHEREAS, the Project consists of one hundred sixteen rental dwelling units, including fifty-three units operated as Section 8 project-based units and fifty-two units operated as public housing units, and related facilities; and

WHEREAS, the compliance period, as defined by the Code, for the low-income housing tax credits has ended, and Raymond James desires to sell its entire right title and interest in the Company (the “Investor Interest”) and enter into a purchase and sale agreement (the “Purchase Agreement”) with FRED under which FRED will purchase the Investor Interest for a purchase price of One Hundred Ninety-Eight Thousand One Hundred Sixty-Seven and 90/100 Dollars (\$198,167.90) (the “Purchase Price”);

WHEREAS, FRED plans to assign the Purchase Agreement to Forsyth Economic Ventures, Inc., a North Carolina nonprofit corporation (“FEV”), and

WHEREAS, in connection with the original development of the Project, the Housing Authority of the City of Winston-Salem (“HAWS”) made a loan of in the original principal amount of Two Million Seven Hundred Forty Thousand and 00/100 Dollars (\$2,740,000.00) (the “HOPE VI Loan”) to HHG III for development of the Project pursuant to a FY 2002 HOPE VI Revitalization Grant Agreement between HAWS and the U.S. Department of Housing and Urban Development (“HUD”); and

WHEREAS, the Company seeks the consent of HAWS, as the lender under the HOPE VI Loan, for FEV to purchase the Investor Interest in the Company pursuant to Article 10 of the Regulatory and Operating Agreement by and between HAWS and the Company (the “R&O”), and

WHEREAS, pursuant to Section 10.1(b) of the R&O, HUD consent is not required for transfer of the Investor Interest since Raymond James has paid all capital contributions; and

WHEREAS, the Board of Commissioners has determined purchase of the Investor Interest by FEV from Raymond James is in the best interest of FEV, the Company, and HAWS.

NOW, THEREFORE, BE IT RESOLVED that the HAWS Board of Commissioners, hereby authorizes acquisition of the Investor Interest in the Company by FEV; and further authorizes its officers to execute such documents and enter into such contracts as are usual and customary to consummate the transfer as described herein.

Adopted On: _____ (Date)

Signed: _____
Kevin Cheshire
Board Secretary