

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

PHA Plans / MA 033v05

5 Year Plan for Fiscal Years **2005 - 2009**

Annual Plan for Fiscal Year **2007**

**NOTE: THIS PHA PLANS TEMPLATE (HUD 50075) IS TO BE COMPLETED IN
ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES**

PHA Plan Agency Identification

PHA Name: Brookline Housing Authority

PHA Number: MA033

PHA Fiscal Year Beginning: (04/2007)

PHA Programs Administered:

Public Housing and Section 8
 Section 8 Only
 Public Housing Only
 Number of public housing units: **438**
 Number of S8 units:
 Number of public housing units:
 Number of S8 units: **619**

PHA Consortia: (check box if submitting a joint PHA Plan and complete table)

Participating PHAs	PHA Code	Program(s) Included in the Consortium	Programs Not in the Consortium	# of Units Each Program
Participating PHA 1:				
Participating PHA 2:				
Participating PHA 3:				

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)

- Main administrative office of the BHA @ 90 Longwood Ave., Brookline, MA
- PHA development management offices
- PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- Main administrative office of the BHA @ 90 Longwood Ave., Brookline, MA
- PHA development management offices
- PHA local offices
- Main administrative office of the local government
- Main administrative office of the County government
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

Main business office of the BHA @ 90 Longwood Av., Brookline, MA

PHA development management offices

Other (list below)

5-YEAR PLAN
PHA FISCAL YEARS 2005 - 2009
[24 CFR Part 903.5]

A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

The BHA's mission is: (state mission here)

The Brookline Housing Authority is committed to providing the highest quality affordable housing and making every effort to develop additional affordable housing options in the Town of Brookline.

We shall partner with business, landlords, other housing agencies, Town Departments and our residents to achieve this mission.

We shall carry out all activities in a public, fiscally efficient, non-discriminatory ethical and professional manner. We do this with pride and commitment to excellence.

To achieve our mission we challenge ourselves to these goals:

- To continue to manage the agency in full compliance with all applicable laws, regulations and Statutes.
- To continue to manage the agency to be a HUD High Performer under Public Housing Management Assessment & Section Eight Management Assessment and other Regulatory Compliance Audits.
- To increase availability of affordable options and safe homes for eligible families, seniors, and persons with disabilities.
- To promote an efficient customer-friendly environment through capable and trained employees committed to excellence in public services.
- To develop service components for residents in need so they may maintain their apartment or Rental Assistance Certificate.
- To provide resources for residents to achieve self-sufficiency.
- Through all our actions become the affordable housing landlord of choice by eligible residents in the community.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

- PHA Goal: Expand the supply of assisted housing**
Objectives:
 - Apply for additional rental vouchers:**
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities:**
 - Acquire or build units or developments**
 - Other (list below)

- PHA Goal: Improve the quality of assisted housing**
Objectives:
 - Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)**
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions:
(list; e.g., public housing finance; voucher unit inspections)
 - Renovate or modernize public housing units:**
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)

- PHA Goal: Increase assisted housing choices**
Objectives:
 - Provide voucher mobility counseling:**
 - Conduct outreach efforts to potential voucher landlords**
 - Increase voucher payment standards**
 - Implement voucher homeownership program:**
 - Implement public housing or other homeownership programs:
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:

- Other: (list below) Site wait list for seniors/disabled per designated housing plan.**

HUD Strategic Goal: Improve community quality of life and economic vitality

- PHA Goal: Provide an improved living environment**
Objectives:
 - Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:**
 - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - Implement public housing security improvements:**
 - Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - Other: (list below)

HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals

- PHA Goal: Promote self-sufficiency and asset development of assisted households**
Objectives:
 - Increase the number and percentage of employed persons in assisted families:**
 - Provide or attract supportive services to improve assistance recipients' employability:**
 - Provide or attract supportive services to increase independence for the elderly or families with disabilities.**
 - Other: (list below)

HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing**
Objectives:
 - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:**
 - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:**

Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:

Other: (list below)

Other PHA Goals and Objectives: (list below)

Annual PHA Plan
PHA Fiscal Year 2007
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

BHA 2007 Annual Plan Executive Summary

Purpose: In compliance with Quality Housing and Work Responsibility Act of 1998, the BHA will annually develop a plan regarding policies, priorities, funding and other issues as it relates to the 437 units of federally subsidized housing at 22 High and Walnut St., 50 Pleasant St., 61 Park St., 90 Longwood Ave, and 190 Harvard St. Also covered in this plan are the approximate 619 housing choice Vouchers funded by the Department of Housing and Urban Development.

Housing Needs

Brookline Housing Authority maintains a wait list for all federal Housing programs. Applications for seniors over the age of 62 have been decreasing over time. Special outreach to seniors through senior associations, advocates and in house residents presently in BHA family housing is being developed. Added outreach to private sector organizations and realtors will also be developed in the year 2007.

Presently waiting lists for 2 and 3 bedroom apartments is closed. The BHA will review this decision by September 2007 (12 month from adoption 9-2006), to analyze wait list and unit availability.

The Brookline Housing Authority participates in a Centralized Wait List for Section 8 vouchers. The list is managed centrally by Mass NAHRO. This allows with one simple application for an applicant to be placed on over 60 wait lists throughout Mass. This broadens opportunity for applicants, eliminates duplication for housing authorities and standardizes practice for both parties.

Financial Resources

As this plan is written funding availabilities are being discussed in Washington. BHA anticipates funding for the conventional housing to be approximately \$1.5 million dollars as subsidy (funded at 82% of formula and an \$80,000 increase from 2006). HUD has established a new operating formula for 2007, and this is a transition year as Brookline moves from a Central Office management style to a project based management style. The Capital fund is expected to be funded at similar levels as prior year when the BHA received \$530,000. Section 8 is anticipated to be funded to cover 100% of Housing Assistance Payments. The program administration fund is also expected to be level funded for the year 2007

Eligibility and Admission Policies – Federal Conventional Housing

Presently BHA admits as first priority applicants that are victims of natural disaster or fleeing domestic violence. Second priority is alternative selections below 30% area medium income and above 30% area medium income as published annually by HUD. There is also a preference for residents within each priority. No change is expected to this policy in the year 2007

Rent Determinations are conducted under the precise regulations of HUD. Residents cannot pay more than 30% of monthly adjusted income or 10% of monthly income. There is a minimum rent of \$50. per month for BHA owned housing and \$25.00 for Section 8 vouchers. No changes are expected in 2007.

It should be noted that Congress is considering several bills that could alter tenant selection, rent determinations and other issues. Should laws change or local options be available, this may be considered in consultation with the Resident Advisory Board.

The 2007 Capital Plan and 5 year Capital Needs Plan is attached to this summary

The 2007 Brookline Housing Management Goal statements is attached to this Summary

The BHA for purpose of public disclosure does not plan to Demolish or Dispose of any public housing in 2007

The Brookline Housing Authority does have an approved waiver from HUD to implement a designated housing plan. This plan is monitored monthly by staff with the goal of occupancy in our standard conventional elderly disabled housing an occupancy ratio of 80% over aged 62 and 20% under aged 62 at each location..

A copy of the most recent BHA audit is attached to this Executive Summary

Membership of the Resident Advisory Board and Discussion Points in the Plan Development are attached.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

Table of Contents

	<u>Page #</u>
Annual Plan	
i. Executive Summary	2
ii. Table of Contents	2
1. Housing Needs	6
2. Financial Resources	14
3. Policies on Eligibility, Selection and Admissions	15
4. Rent Determination Policies	25
5. Operations and Management Policies	29
6. Grievance Procedures	31
7. Capital Improvement Needs	32
8. Demolition and Disposition	N/A

9. Designation of Housing	36
10. Conversions of Public Housing	N/A
11. Homeownership	N/A
12. Community Service Programs	41
13. Crime and Safety	44
14. Pets (Inactive for January 1 PHAs)	46
15. Civil Rights Certifications (included with PHA Plan Certifications)	N/A
16. Audit	N/A
17. Asset Management	47
18. Other Information	48

Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

Required Attachments:

- Admissions Policy for Deconcentration
- FY 2007 Capital Fund Program Annual Statement
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- List of Resident Advisory Board Members (a)**
- List of Resident Board Member (b)**
- Community Service Description of Implementation (c)**
- Information on Pet Policy
- Section 8 Homeownership Capacity Statement, if applicable
- Description of Homeownership Programs, if applicable

Optional Attachments:

- BHA Management Organizational Chart (d)**
- FY 2007 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)**
- BHA Section 8 Resident Advisory Member (e)**
- BHA Annual Statement/Performance & Evaluation Report FY 04 (f)**
- BHA Annual Statement/Performance & Evaluation Report FY 05 (g)**
- BHA Annual Statement/Performance & Evaluation Report FY 06 (h)**
- Substantial Modifications to the Annual Plan (i)**
- BHA Annual Progress Statement (j)**
- BHA VAWA (k)**

Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
√	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
√	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
√	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
√	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
√	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
√	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
√	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
√	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
√	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
	Schedule of flat rents offered at each public housing development	Annual Plan: Rent Determination

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
√	<input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	
√	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
√	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
√	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
√	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
√	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
√	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
√	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
√	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
√	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
√	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	1872	4	5	5	5	4	3
Income >30% but <=50% of AMI	691	4	5	5	5	4	3
Income >50% but <80% of AMI	488	4	4	4	5	4	3
Elderly	1073	3	2	3	5	3	3
Families with Disabilities	485	4	5	4	4	4	3
Race/ White	3456	3	3	3	5	3	3
Race/ Black	372	3	3	3	5	3	3
Race/ AI/ Alaskan	6	3	3	3	5	3	3
Race/ Asian	290	3	3	3	5	3	3

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction/s**
Indicate year: 2000
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information) General knowledge from applicant disclosure**

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance Pre-existing list			
<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)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	455		16
Extremely low income <=30% AMI	388	85%	
Very low income (>30% but <=50% AMI)	61	13%	
Low income (>50% but <80% AMI)	6	2%	
Families with children	85	19%	
Elderly families	48	10%	
Families with	30	6%	

Housing Needs of Families on the Waiting List			
Disabilities			
Race/ethnicity White	190	42%	
Race/ethnicity Black	143	31%	
Race/ethnicity AI/Alaska	2	0%	
Race/ethnicity No race	90	20%	
Race/ethnicity Asian	30	7%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Jan 2005			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance Centralized list			
<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)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	56975		
Extremely low income <=30% AMI	51798	91%	
Very low income (>30% but <=50% AMI)	4777	8%	
Low income (>50% but <80%	281	0%	

Housing Needs of Families on the Waiting List			
AMI)			
Families with children	35850	63%	
Elderly families	3187	6%	
Families with Disabilities	18599	33%	
Race/ethnicity White	26196	46%	
Race/ethnicity Black	10768	19%	
Race/ethnicity Asian	1737	3%	
Pacific islander	138	0%	
American Indian	1036	2%	
Hispanic	18193	32%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
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			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	2127		
Extremely low income	1906	89%	

Housing Needs of Families on the Waiting List			
<=30% AMI			
Very low income (>30% but <=50% AMI)	176	8%	
Low income (>50% but <80% AMI)	46	3%	
Families with children	1139	53%	
Elderly families	660	33%	
Families with Disabilities	329	15%	
Race/ethnicity White	729	34%	
Race/ethnicity Black	637	30%	
Race/ethnicity AI/Alaska	13	0%	
Race/ethnicity Asian	191	9%	
No race designated	557	27%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	566	27%	
2 BR	977	46%	
3 BR	494	23%	
4 BR	78	3%	
5 BR	12	1%	
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? September 2006 / (7) months			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" 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 checked="" type="checkbox"/> Elderly, Disabled 1 & 4 bedroom unit are open			

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units**
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction**
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required**
- Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration**
- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program**
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies**
- Other (list below)

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

Select all that apply

- Apply for additional section 8 units should they become available**
- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.**
- Other: (list below) To Project Base 25 Housing choice Vouchers with priorities for family housing units and housing for persons with disabilities with / or without in house service component**

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

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

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing**

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance**
 - Employ admissions preferences aimed at families with economic hardships
 - Adopt rent policies to support and encourage work
 - Other: (list below) To Project Base 25 Housing Choice Vouchers with priorities for family housing units and housing units and housing for persons with disabilities with / or without in house service component**
- Need: Specific Family Types: Families at or below 50% of median**

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

Select all that apply

- Employ admissions preferences aimed at families who are working**
- Adopt rent policies to support and encourage work**
- Other: (list below) Provide services to improve job skills**

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

- Seek designation of public housing for the elderly
- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing**
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available**
- Affirmatively market to local non-profit agencies that assist families with disabilities**
- Other: (list below) To Project Base 25 Housing Choice Vouchers with priorities for family housing units and housing units and housing for persons with disabilities with / or without in house service component**

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

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

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units**
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)

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

(2) Reasons for Selecting Strategies

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

- Funding constraints**
- Staffing constraints**
- Limited availability of sites for assisted housing**
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2007 grants)		
a) Public Housing Operating Fund	\$1,352,063	Federal housing operating costs insurance
b) Public Housing Capital Fund	\$529,980	Elevator Modernization
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$6,330,024	Rental Assistance Payments
	\$509,508	Program Management
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
FY 06	\$343,130	Elevator Modernization
FY 05	\$367,577	All federal properties
3. Public Housing Dwelling Rental Income	\$1,590,000	Management & maintenance costs & utilities
4. Other income (list below)		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
Excess Utilities	\$9,000	Air Conditioner charges
Interest Income	\$9,648	Operations
Other Income/ Tenant charges	\$20,000	Key replacement, lock outs & damage to units
4. Non-federal sources (list below)		
Total resources	\$11,060,930	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time) 6 (six) months**
- Other: (describe)

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

- Criminal or Drug related activity**
- Rental history**
- Housekeeping
- Other (describe) Prior Landlords**

- c. Yes **No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?**
- d. **Yes** No: **Does the PHA request criminal records from State law enforcement agencies for screening purposes?**
- e. Yes **No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)**

(2)Waiting List Organization

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

- Community-wide list**
- Sub-jurisdictional lists
- Site-based waiting lists
- Other (describe)

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

- BHA main administrative office @ 90 Longwood Ave., Brookline, MA**
- PHA development site management office
- Other (list below)

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

1. How many site-based waiting lists will the PHA operate in the coming year?

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

3. Yes No: May families be on more than one list simultaneously
If yes, how many lists?

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

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)

(3) Assignment

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

- One**
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

- Yes No: **Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?**

b. Transfer policies:

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

- Emergencies**
- Overhoused**
- Underhoused**
- Medical justification**
- Administrative reasons determined by the PHA (e.g., to permit modernization work)**
- Resident choice: (state circumstances below)
- Other: (list below)

c. Preferences

1. Yes No: **Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection (5) Occupancy)**
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility,)**
- Victims of domestic violence**
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction**
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)**
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below) Residency preferences, Natural Disaster**

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

Date and Time

Former Federal preferences:

- 1. Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)**
- 1. Victims of domestic violence**
 - Substandard housing
 - Homelessness
 - High rent burden

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)

2. **Households that contribute to meeting income requirements (targeting)**
 Those previously enrolled in educational, training, or upward mobility programs

- Victims of reprisals or hate crimes

1. **Other preference(s) (list below)**

Natural disaster

Residents who live and/or work in jurisdiction

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers

- Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements / applicants with the same preference(s) are selected by date & time**

(5) Occupancy

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

- The PHA-resident lease**
 The PHA's Admissions and (Continued) Occupancy policy
 PHA briefing seminars or written materials
 Other source (list)

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

- At an annual reexamination and lease renewal**
 Any time family composition changes
 At family request for revision
 Other (list)

(6) Deconcentration and Income Mixing

- a. Yes **No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate**

the need for measures to promote deconcentration of poverty or income mixing?

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

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

- Adoption of site based waiting lists
If selected, list targeted developments below:
- Employing waiting list “skipping” to achieve deconcentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments
If selected, list targeted developments below:
- Other (list policies and developments targeted below)

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

- Not applicable: results of analysis did not indicate a need for such efforts**
- List (any applicable) developments below:

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

- Not applicable: results of analysis did not indicate a need for such efforts**
 List (any applicable) developments below:

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation**
- Criminal and drug-related activity, more extensively than required by law or regulation
- More general screening than criminal and drug-related activity (list factors below)
- Other (list below) Credit & Court Records**
- b. Yes **No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?**
- c. **Yes** No: **Does the PHA request criminal records from State law enforcement agencies for screening purposes?**
- d. Yes **No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)**
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
- Other (describe below)

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- None**
- Federal public housing
- Federal moderate rehabilitation

- Federal project-based certificate program
- Other federal or local program (list below)

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

- BHA main administrative office @ 90 Longwood Ave., Brookline, MA**
- Other (list below)

(3) Search Time

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

If yes, state circumstances below:

Participant is still searching and can demonstrate evidence or other good cause e.g. medical

(4) Admissions Preferences

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)**

Local resident who is displaced by Natural disaster, Displaced by Public Action, Fleeing Domestic Violence, Displaced by hate crimes or reprisals, or Board of Health Condemnation

Local resident who is or about to be displaced by landlord – non-renewal through no-fault of their own

Non- local resident who is displaced by natural disaster, displaced by public action, fleeing domestic violence, displaced by hate crimes or reprisals, or board of health condemnation

Local resident who is a single veteran or single persons with disabilities

Local resident

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

Date and Time

Former Federal preferences

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)

Victims of domestic violence

Substandard housing

Homelessness

High rent burden

Other preferences (select all that apply)

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

- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)**

- 1. Local resident who is displaced by Natural disaster, Displaced by Public Action, Fleeing Domestic Violence, Displaced by hate crimes or reprisals, or Board of Health Condemnation**
- 2. Local resident who is or about to be displaced by landlord – non-renewal through no-fault of their own**
- 3. Non- local resident who is displaced by natural disaster, displaced by public action, fleeing domestic violence, displaced by hate crimes or reprisals, or board of health condemnation**
- 4. Local resident who is a single veteran or single persons with disabilities**
- 5. Local resident**
- 6. All other standard applicant(s)**

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

- Date and time of application**
- Drawing (lottery) or other random choice technique

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

- This preference has previously been reviewed and approved by HUD**
- The PHA requests approval for this preference through this PHA Plan

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

- The PHA applies preferences within income tiers

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

(5) Special Purpose Section 8 Assistance Programs

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

- The Section 8 Administrative Plan**
 Briefing sessions and written materials
 Other (list below)

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

- Through published notices**
 Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

(1) Income Based Rent Policies

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

- a. Use of discretionary policies: (select one)

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

---or---

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

- b. Minimum Rent

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

- \$0
- \$1-\$25
- \$26-\$50

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

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

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

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

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

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

- Fixed percentage (other than general rent-setting policy)
- If yes, state percentage/s and circumstances below:

- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

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

- Yes for all developments
- Yes but only for some developments
- No**

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

- For all developments
- For all general occupancy developments (not elderly or disabled or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion
- For certain size units; e.g., larger bedroom sizes
- Other (list below)

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

- Market comparability study
- Fair market rents (FMR)
- 95th percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The “rental value” of the unit
- Other (list below)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- Never
- At family option
- Any time the family experiences an income increase / decrease**
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
- Other (list below) Change in family size**

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

(2) Flat Rents

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- The section 8 rent reasonableness study of comparable housing**
- Survey of rents listed in local newspaper**
- Survey of similar unassisted units in the neighborhood
- Other (list/describe below)

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies.

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

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR**
- Above 110% of FMR (if HUD approved; describe circumstances below)**
Request is presently being analyzed.

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

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- The PHA has chosen to serve additional families by lowering the payment standard
- Reflects market or submarket
- Other (list below)

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

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

Reflects market or submarket

To increase housing options for families

Other (list below)

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

Annually

Other (list below)

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

Success rates of assisted families

Rent burdens of assisted families

Other (list below)

(2) Minimum Rent

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

\$0

\$1-\$25

\$26-\$50

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

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

An organization chart showing the BHA's management structure and organization is attached.

A brief description of the management structure and organization of the PHA follows: Centralized operation with decentralized site management & site management

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	437	35
Section 8 Vouchers	619	48
Section 8 Certificates	0	0
Section 8 Mod Rehab	0	0
Special Purpose Section 8 Certificates/Vouchers (list individually)	0	0
Public Housing Drug Elimination Program (PHDEP)	0	0
Other Federal Programs(list individually)	0	0

C. Management and Maintenance Policies

List the PHA’s public housing management and maintenance policy documents, manuals and handbooks that contain the Agency’s rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below)
 Management Plan, Rent Collection, Pest Control (Extermination), Parking Policy and Grievance and Admissions & Continued Occupancy Plan (ACOP)

- (2) Section 8 Management: (list below)

Administrative Plan
Grievance procedure

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

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

If yes, list additions to federal requirements below:

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

- BHA main administrative office @ 90 Longwood Ave., Brookline, MA**
 PHA development management offices
 Other (list below)

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)
- PHA main administrative office @ 90 Longwood Ave., Brookline, MA**
- Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

A. Capital Fund Activities

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name)

-or-

- The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)**

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: <p style="text-align: center;">Brookline Housing Authority</p>	Grant Type and Number Capital Fund Program Grant No: MA06P033501-07 Replacement Housing Factor Grant No:	Federal FY of Grant: <p style="text-align: center;">2007</p>
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending:
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	105,996			
3	1408 Management Improvements	90,000			
4	1410 Administration	52,998			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	30,000			
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	240,986			
11	1465.1 Dwelling Equipment—Nonexpendable	10,000			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2-20)	529,980			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security –Soft Costs				
25	Amount of Line 21 related to Security-- Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

PHA Name: Brookline Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P033501-07 Replacement Housing Factor Grant No:			Federal FY of Grant: 2007			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
H.A.-Wide	Upgrade appliances for energy savings	1465	15	10,000				
MA 33-1 Walnut St. Apts.	Elevator Upgrades	1460	2	4,000				
MA 33-2 Sussman House	Elevator Upgrades		2	106,986				
MA 33-3 O'Shea House	Elevator Upgrades	1460	2	30,000				
MA 33-5 Morse Apts.	Elevator Upgrades	1460	2	100,000				
MA 33-7 Kickham Apts.	No development-specific work planned							
H.A.-Wide	Operations	1406		105,996				
	Computer Learning Center Staff	1408		56,000				
	Section 3 Coordinator	1408		8,000				
	Special Initiatives Coordinator	1408		26,000				
	Administration	1410		52,998				
	A/E Fees and misc. costs	1430		30,000				

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

PHA Name: Brookline Housing Authority		Grant Type and Number Capital Fund Program No: MA06P033501-07 Replacement Housing Factor No:					Federal FY of Grant: 2007	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
MA 33-1	9/30/09			9/30/11				
MA 33-2	9/30/09			9/30/11				
MA 33-3	9/30/09			9/30/11				
MA 33-5	9/30/09			9/30/11				
MA 33-7	9/30/09			9/30/11				
HA-Wide:								
Mgmt. Imp.	9/30/09			9/30/11				
Fees & Costs	9/30/09			9/30/11				

(2) Optional 5-Year Action Plan

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

a. **Yes** **No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)**

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name

-or-

The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name: Brookline Housing Authority		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2008 PHA FY: 2009	Work Statement for Year 3 FFY Grant: 2009 PHA FY: 2010	Work Statement for Year 4 FFY Grant: 2010 PHA FY: 2011	Work Statement for Year 5 FFY Grant: 2011 PHA FY: 2012
	Annual Statement				
MA 33-1, Walnut		169,000		12,500	15,000
MA 33-2, Sussman			200,000	112,500	115,000
MA 33-3, O'Shea		53,500	43,000		80,000
MA 33-5, Morse		9,000	13,000	90,500	70,000
MA 33-7, Kickham		26,500		24,500	50,000
HA-Wide Activities And Costs		271,980	273,980	289,980	199,980
CFP Funds Listed for 5-year planning		\$529,980	\$529,980	\$529,980	\$529,980
Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year : <u>2</u> FFY Grant: 2008 PHA FY: 2009			Activities for Year: <u>3</u> FFY Grant: 2009 PHA FY: 2010		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	MA 33-1	Building envelope repairs bldg. H	125,000			
Annual	Walnut St. Apts.	Corridor fire doors, magnetic holds	44,000	MA 33-1	No development-specific work	
Statement		SUBTOTAL	169,000	Walnut St. Apts.		
	MA 33-2	No development-specific work				
	Sussman House			MA 33-2	Building envelope, phase 1	200,000
				Sussman House	SUBTOTAL	200,000
	MA 33-3	GFI's in kitchens & baths	37,500			
	O'Shea House	Trash compactor, chute doors	14,000	MA 33-3	Electrical service breakers	13,000
		Gas vent pipe	2,000	O'Shea House	Electrical heating units	30,000
		SUBTOTAL	53,500		SUBTOTAL	43,000
	MA 33-5	Back-flow preventer	9,000			
	Morse Apts.	SUBTOTAL	9,000			
				MA 33-5	Electrical service breakers	13,000
	MA 33-7	Back-flow preventer	9,000	Morse Apts.	SUBTOTAL	13,000
	Kickham Apts.	Extend E. generator exhaust pipe	2,500			
		Caulk at AC sleeves & greenhouse	15,000	MA 33-7	No development-specific work	
		SUBTOTAL	26,500	Kickham Apts.		
	HA-Wide	Security surveillance systems	52,000	HA-Wide	Water/Energy measures per audit	30,000
	Activities	Misc. caulking repairs	13,000	Activities	Electrical feeders	32,500
	And Costs	Misc. exter. door replacement	20,000	And Costs	Kitchen upgrades	25,000
		Misc. flooring replacement	10,000		Bathroom upgrades	25,000
		Misc. inter. door replacement	5,000		Learning center staff	43,000
		Appliances	10,000		Section 3 Coordinator	8,000
		Learning center staff	43,000		Special Initiatives Coord.	22,000
		Section 3 Coordinator	8,000		A/E fees & misc. costs	30,000
		Special Initiatives Coord.	22,000		Administration	52,998
		A/E fees & misc. costs	30,000		Operations	5,482
		Administration	52,998		SUBTOTAL	273,980
		Operations	5,482			
		SUBTOTAL	271,980			
Total CFP Estimated Cost			\$529,980			\$529,980

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year : <u>4</u> FFY Grant: 2010 PHA FY: 2011			Activities for Year: <u>5</u> FFY Grant: 2011 PHA FY: 2012		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
MA 33-1	<i>Trash Compactor</i>	12,500			
<i>Walnut St. Apts.</i>	SUBTOTAL	12,500	MA 33-1	<i>Site Improvements</i>	15,000
			<i>Walnut St. Apts.</i>	SUBTOTAL	15,000
MA 33-2	Building Envelope	100,000			
Sussman House	<i>Trash Compactor</i>	12,500	MA 33-2	Building Envelope	100,000
	SUBTOTAL	112,500	Sussman House	<i>Site Improvements</i>	15,000
MA 33-3	No development-specific work			SUBTOTAL	115,000
O'Shea House					
MA 33-5	Building Envelope	28,000	MA 33-3	Emergency Generator	50,000
Morse Apts.	<i>Trash Compactor</i>	12,500	O'Shea House	Building Envelope	30,000
	Emergency Generator	50,000		SUBTOTAL	80,000
	SUBTOTAL	90,500			
MA 33-7	<i>Trash Compactor</i>	12,500	MA 33-5	Sliding Glass Doors	70,000
Kickham Apts.	Carpet in corridors	12,000	Morse Apts.	SUBTOTAL	70,000
	SUBTOTAL	24,500			
			MA 33-7	Emergency Generator	50,000
HA-Wide	Roof repairs	10,000	Kickham Apts.	SUBTOTAL	50,000
<i>Activities</i>	Exterior doors	10,000			
<i>And Costs</i>	Misc. flooring replacement	10,000			
	Misc. inter. door replacement	5,000	HA-Wide	Roof repairs	10,000
	Kitchen upgrades	35,000	<i>Activities</i>	Exterior doors	10,000
	Bathroom upgrades	30,000	<i>And Costs</i>	Learning center staff	43,000
	Appliances	10,000		Section 3 Coordinator	8,000
	Learning center staff	43,000		Special Initiatives Coord.	22,000
	Section 3 Coordinator	8,000		A/E fees & misc. costs	30,000

	Special Initiatives Coord.	22,000		Administration	52,998
	A/E fees & misc. costs	30,000		Operations	3,982
	Administration	52,998		Prelim. costs to acquire units	20,000
	Operations	3,982		SUBTOTAL	199,980
	Prelim. costs to acquire units	20,000			
	SUBTOTAL	289,980			
	Total CFP Estimated Cost	\$529,980			\$529,980

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

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

1. Development name:
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)
 - Revitalization Plan under development
 - Revitalization Plan submitted, pending approval
 - Revitalization Plan approved
 - Activities pursuant to an approved Revitalization Plan underway

- Yes No: c) **Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?**
If yes, list development name/s below:

- Yes No: d) **Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?**
If yes, list developments or activities below:

- Yes No: e) **Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?**
If yes, list developments or activities below:

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. Yes No: **Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)**

2. Activity Description

Yes No: **Has the PHA provided the activities description information in the optional Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)**

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

9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1. Yes No: **Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)**

2. Activity Description

- Yes No: **Has the PHA provided all required activity description information for this component in the optional Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.**

Designation of Public Housing Activity Description
1a. Development name: All
1b. Development (project) number: MA / 33-1,2,3,5&7
2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input checked="" type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: (29/04/05)
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development 33-2, 3, 5 & 7 / 24 units @ 33-1

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act

1. Yes No: **Have any of the PHA’s developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If “No”, skip to component 11; if “yes”, complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)**

2. Activity Description

- Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 11. If “No”, complete the Activity Description table below.

Conversion of Public Housing Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	
<input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)	
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)	
4. Status of Conversion Plan (select the statement that best describes the current status)	
<input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway	

5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)

- Units addressed in a pending or approved demolition application (date submitted or approved:
- Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved:)
- Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved:)
- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. Yes **No:** **Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to small PHA or high performing PHA status. PHAs completing streamlined submissions may skip to component 11B.)**

2. Activity Description

Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

B. Section 8 Tenant Based Assistance

1. Yes No: **Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. High performing PHAs may skip to component 12.)**

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

- Client referrals
 Information sharing regarding mutual clients (for rent determinations and otherwise)
 Coordinate the provision of specific social and self-sufficiency services and programs to eligible families

- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- Preference/eligibility for public housing homeownership option participation
- Preference/eligibility for section 8 homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

- Yes **No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)**

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Section 3 Coordinator	20	None	Trustman	Both
Computer Learning Center	50	None	22 High Street	Both
ESL Classes	25	None	22 High Street	Both

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY April 1, 2006 Estimate)	Actual Number of Participants (As of: 31/03/07)
Public Housing	-0-	-0-
Section 8	39	13

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

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies**
 - Informing residents of new policy on admission and reexamination**
 - Actively notifying residents of new policy at times in addition to admission and reexamination.**

- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

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

1. Describe the need for measures to ensure the safety of public housing residents

(select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children**
- Observed lower-level crime, vandalism and/or graffiti**
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- Other (describe below)

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

- Safety and security survey of residents**
- Analysis of crime statistics over time for crimes committed “in and around” public housing authority**
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports**
- PHA employee reports**
- Police reports**
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs**

Other (describe below)

3. Which developments are most affected? (list below) **MA33-1**

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

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

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

Crime Prevention Through Environmental Design

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

Volunteer Resident Patrol/Block Watchers Program

Other (describe below) Participation in Town Anti-Crime Program

2. Which developments are most affected? (list below) **MA33-1**

C. Coordination between PHA and the police

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

Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan

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

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

Police regularly testify in and otherwise support eviction cases

Police regularly meet with the PHA management and residents

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

Other activities (list below)

2. Which developments are most affected? (list below) **MA33-1**

D. Additional information as required by PHDEP/PHDEP Plan

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

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

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

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

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

The BHA has a pet policy conforming to HUD regulations. To comply with this policy, a tenant must fully register their animal with the BHA before bringing it onto the premises. Tenants are given a copy of the written policy and registration form and must sign and acknowledge the following: the right of the BHA to enter the registered pet owner's dwelling unit when there is evidence that an animal left alone is in danger or distress; that they have received a copy of all animal-related requirements and restrictions administered by the BHA; that failure to abide by any animal-related requirement or restriction constitutes a violation of a BHA tenant's lease and is grounds for lease termination.

The pet policy defines animals that are not permitted. It mandates compliance with state and local ordinances. It also lists registration requirements including evidence that all cats or dogs have been spayed or neutered and designation of an alternative pet care giver. Other restrictions include limits on numbers of pets according to the size of the unit and weight limits for pets.

The pet policy defines ongoing tenant responsibilities including proper pet waste disposal, restraint and confinement of pets, the requirement of the pet owner to prevent the pet from interfering with BHA management and maintenance functions, proper care of the pet, restrictions on housing stray animals, liability for property damage or personal injury caused by a pet, requirement to exterminate for fleas, ticks or other animal-related pests, and pet noise restrictions.

The full BHA pet policy is incorporated as a supporting document to this Annual Plan.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

1. Yes No: **Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?**
(If no, skip to component 17.)
2. Yes No: **Was the most recent fiscal audit submitted to HUD?**
3. Yes No: **Were there any findings as the result of that audit?**
4. Yes No: **If there were any findings, do any remain unresolved?**
If yes, how many unresolved findings remain? _____
5. Yes No: **Have responses to any unresolved findings been submitted to HUD?**
If not, when are they due (state below)?

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1. Yes No: **Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have not been addressed elsewhere in this PHA Plan?**
2. What types of asset management activities will the PHA undertake? (select all that apply)
 - Not applicable
 - Private management
 - Development-based accounting
 - Comprehensive stock assessment
 - Other: (list below) Preparation for site based management**
3. Yes No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: **Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?**

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
 Attached at Attachment (File name)
 Provided below: Comments from the Resident Advisory Board Meetings.

Session #1 February 1, 2007- 90 Longwood Ave

Mr. Cloonan discussed several items with the members of the RAB. First was an overview of the requirements of the RAB as it relates to the BHA Annual Plan that is required by law by HUD. Discussions included BHA having a closed 2 and 3 bedroom list for family housing, that will be re-evaluated in September 2007. Mr. Cloonan also discussed the issues of aging in place and the number of BHA residents 90 years and older. Residents spoke favorably of the Service programs at 50 Pleasant and 61 Park Street. BHA will explore the expansion of the program to 90 Longwood over the next year. Mr. Cloonan provided information on resident profiles since the inception of the Designated Housing Plan. Pending vacancies and unit acceptances, buildings are moving toward the 80/20 occupancy of the plan by ages over and under 62.

Mr. Baronas provided overview of BHA leases and rent calculation procedures. Copies of all documents are given to residents and duplicate copies can be made available.

Mr. Cloonan shared the goal of BHA to outreach more to the resident communities. BHA is planning several building meetings, special discussions on services and security and encourages residents to become active in their community and the Town of Brookline.

Session #2 March 15, 2007- 61 Park Street

Following introductions Mr. Cloonan discussed the BHA operating budget and our movement required by HUD of Project Accounting, budgeting and management. Mr. Cloonan provided information on budget increases for the coming fiscal year, and the expectation that actual funding will be approximately 80% of the formula. Mr. Cloonan shared information on utility costs and the need to decrease utility costs going forward.

Over the coming year Mr. Cloonan explained far more cooperation on utilities and recycling would be needed. He also noted, BHA would be updating resident charges for items abused or neglected.

Ms. Correnti discussed the modernization program for federal programs. The primary item in the 2007 Annual Plan is elevator improvements at all federal high rise buildings. Items in the five year capital needs program were also discussed, however the need for elevator upgrades were of highest priority.

Mr. Cloonan also discussed the Section 8 program and the number of families this program serves. BHA will continue to look toward increasing the number of project base vouchers (goal for 2007 is approximately 25-30) for families and disabled individuals.

Mr. Cloonan closed by saying a new congress will likely mean changes in funding, program regulations and reporting requirements.

3. In what manner did the PHA address those comments? (select all that apply)

- Considered comments, but determined that no changes to the PHA Plan were necessary.**
- The PHA changed portions of the PHA Plan in response to comments
List changes below:
- Other: (list below)

B. Description of Election process for Residents on the PHA Board

- 1. Yes No: **Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)**
- 2. Yes No: **Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)**

3. Description of Resident Election Process

a. Nomination of candidates for place on the ballot: (select all that apply)

- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot

Other: (describe) Town –Wide Election

b. Eligible candidates: (select one)

- Any recipient of PHA assistance
- Any head of household receiving PHA assistance
- Any adult recipient of PHA assistance
- Any adult member of a resident or assisted family organization
- Other (list) Incumbent Resident Member of (MA33-1) ran for Town-Wide seat**

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list) all Town Registered Voters**

C. Statement of Consistency with the Consolidated Plan

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. **Consolidated Plan jurisdiction: (provide name here) Town of Brookline**

2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)

- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.**
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)**
- Other: (list below) Preservation of existing affordable housing support housing authority with CDBG Funds**

4. **The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below) Preservation of existing housing**

D. Other Information Required by HUD

Use this section to provide any additional information requested by HUD.

Attachments

Use this section to provide any additional attachments referenced in the Plans.

Advisory Board Members	Attachment a
BHA Resident Board Member	Attachment b
BHA Community Service Program	Attachment c
BHA Organizational Chart	Attachment d
BHA Section 8 Resident Advisory Member	Attachment e
BHA Annual Statement/Performance & Evaluation Report FY04	Attachment f
BHA Annual Statement/Performance & Evaluation Report FY05	Attachment g
BHA Annual Statement/Performance & Evaluation Report FY06	Attachment h
Substantial Modifications to the Annual Plan	Attachment i
BHA Annual Plan Progress Statement	Attachment j
VAWA	Attachment k

PHA Plan Table Library

Component 7 Capital Fund Program Annual Statement Parts I, II, and II

Annual Statement Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number FFY of Grant Approval: (MM/YYYY)

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	
4	1410 Administration	
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	
10	1460 Dwelling Structures	
11	1465.1 Dwelling Equipment-Nonexpendable	

12	1470	Nondwelling Structures	
13	1475	Nondwelling Equipment	
14	1485	Demolition	
15	1490	Replacement Reserve	
16	1492	Moving to Work Demonstration	
17	1495.1	Relocation Costs	
18	1498	Mod Used for Development	
19	1502	Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)		
21	Amount of line 20 Related to LBP Activities		
22	Amount of line 20 Related to Section 504 Compliance		
23	Amount of line 20 Related to Security		
24	Amount of line 20 Related to Energy Conservation Measures		

Annual Statement
Capital Fund Program (CFP) Part II: Supporting Table

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost

--	--	--	--	--

Annual Statement

Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)

Optional Table for 5-Year Action Plan for Capital Fund (Component 7)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA-wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5-Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
Total estimated cost over next 5 years				

2007 RAB Committee Members

Attachment a

Ms. Eleanor Wendler
50 Pleasant Street, #2G
Brookline, MA 02446

Ms. Frances Goode
61 Park Street, #6H
Brookline, MA 02446

Ms. Carmel Calixte
22 High Street, #30
Brookline, Ma 02446

Ms. Bernice Speen
50 Pleasant Street, #2K
Brookline, MA 02446

Mr. Jack Braithwaite
61 Park Street, #7L
Brookline, MA 02446

Ms. James
40 Walnut Street
Brookline, MA 02445

Mr. Bruce Wolff
50 Pleasant Street, #3D
Brookline, MA 02446

Ms. Deborah McKane
61 Park Street, #9H
Brookline, MA 02446

Mr. Samuel Rodriguez
22 High Street, #11
Brookline, MA 02445

Mr. Steve Daisy
50 Pleasant Street, #9B
Brookline, MA 02446

Mr. Richard Murray
61 Park Street, #5D
Brookline, MA 02446

Mr. Steven Weinograd
22 High Street, #48
Brookline, MA 02445

Mr. Florence Dwyer
50 Pleasant Street, #8M
Brookline, MA 02446

Mr. Ed Powell
61 Park Street, #10A
Brookline, MA 02446

Ms. Jeanne Winn
90 Longwood Ave., #9G
Brookline, MA 02446

Ms. Valencia Sparrow
50 Pleasant Street, #8H
Brookline, MA 02446

Mr. John Rubin
190 Harvard Street, #200
Brookline, AM 02446

Ms. Helleine Nillision
90 Longwood Ave., #6H
Brookline, MA 02446

Ms. Nancy Lepore
50 Pleasant Street, #7F
Brookline, MA 02446

Ms. Doreen Vittori
190 Harvard Street, #500
Brookline, MA 02446

Ms. Barbara Morrison
90 Longwood Ave., #10C
Brookline, MA 02446

Ms. Lisa Nascimento
50 Pleasant Street, #1A
Brookline, MA 02446

Ms. Camille Contardo
190 Harvard Street, #308
Brookline, MA 02446

Mr. Amjad Kemal
90 Longwood Ave., #2G
Brookline, MA 024446

Ms. Elizabeth Warshaw
61 Park Street, #6C
Brookline, MA 02446

Mr. Peter Keller
190 Harvard Street, #600
Brookline, MA 02446

Ms. Yolanda Bledsoe
90 Longwood Ave., #8D
Brookline, MA 02446

Ms. Patricia Timothy
61 Park Street, #4F
Brookline, MA 02446

Ms. Christina Cromartie
22 High Street, #22
Brookline, MA 02445

Mr. John Differ
90 Longwood Ave., #7H
Brookline, MA 02446

BHA Resident Board Member

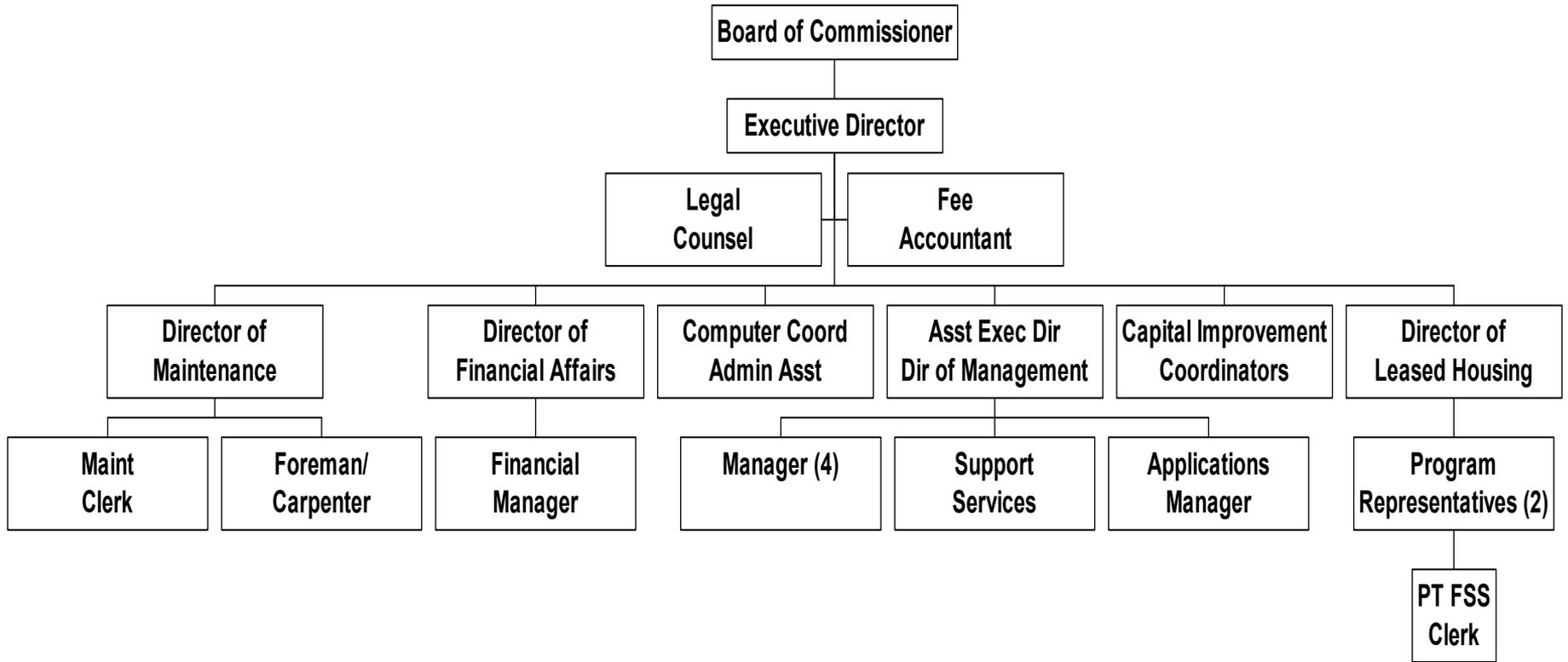
Ms. Barbara Dugan, Treasurer
8 Walnut Street, #1 (33-1)
Brookline, MA 02445
Elected to serve through 2010

Description of the BHA Community Service Program

The Brookline Housing Authority has implemented a Community Service and Self Sufficiency Policy at all of its federal conventional developments. The policy requires that all non-exempt adult residents of federal public housing contribute (8) hours per month of community service or participate in (8) hours of training, counseling, classes or other activities that help an individual toward self sufficiency and economic independence. This policy has been incorporated into the federal public housing lease by addendum.

All residents are given copies of the Brookline Housing Authority Community Service and Self Sufficiency Policy. Household members between the ages of 18 and 62 who claim an exemption must certify their exemption. Non-exempt household members are identified and informed of their obligations under their lease with regard to Community Service and Self Sufficiency requirements. These individuals are referred to the BHA Next Steps Program counselor for referral to community service opportunities or self sufficiency activities. At the time of annual rent recertification, these Community Service and Self Sufficiency activities are verified. If a non-exempt resident fails to verify compliance with the policy, additional steps are taken with the household, including legal eviction action if necessary.

BROOKLINE HOUSING AUTHORITY



BHA Section 8 RAB Member

Ms. Agnes Rogers
99 Kent Street
Building 7, Suite #512
Brookline, MA 02445

Annual Statement/Performance and Evaluation Report

Attachment f

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: Brookline Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06P033501-04 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no: 3)
 Performance and Evaluation Report for Period Ending: **9-30-06**
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	0	50,000	50,000	50,000
3	1408 Management Improvements	72,577	72,578	72,578	72,578
4	1410 Administration	63,857	63,857	63,857	63,857
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	72,583	98,834	98,834	71,134
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	429,557	353,305	353,305	0
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2-20)	638,574	638,574	638,574	257,568
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security –Soft Costs				
25	Amount of Line 21 related to Security-- Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

PHA Name: Brookline Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P033501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
MA 33-1	Masonry, concrete & metal repairs	1460		111,000	192,404	192,404	0	Construction
Walnut St. Apts.	A/E fees for masonry, concrete & metal	1430		26,150	30,035	30,035	26,595	Construction
MA 33-2	Repair wood façade	1460		135,441	0			To FY08
Sussman House	A/E fees for façade	1430		3,305	12,278	12,278	10,763	Design
MA 33-3	No development-specific improvements are planned							
O'Shea House								
MA 33-5	No development-specific improvements are planned							
Morse Apts.								
MA 33-7	Window replacement	1460		183,116	160,901	160,901	0	Construction
Kickham Apts.	A/E fees for windows	1430		10,000	16,404	16,404	6,943	Construction
	A/E for site contamination clean-up	1430		0	6,936	6,936	1,929	From FY03

Annual Statement/Performance and Evaluation Report

Attachment g

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: Brookline Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06P033501-05 Replacement Housing Factor Grant No:	Federal FY of Grant: 2005
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no: 2)
 Performance and Evaluation Report for Period Ending: 9/30/06
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements	95,000	95,000	95,000	95,000
4	1410 Administration	54,062	54,062	54,062	54,062
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	15,278	17,278	16,279	1,001
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	376,280	374,280	7,591	0
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2-20)	540,620	540,620	172,932	150,063
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security –Soft Costs				
25	Amount of Line 21 related to Security-- Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures	6,555	6,555	6,555	0

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

PHA Name: Brookline Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P033501-05 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
MA 33-1 Walnut St. Apts.	Masonry, concrete & metal repairs	1460		0	7,702	7,591	0	From FY04
MA 33-2 Sussman House	Replace wood façade Elevator upgrades	1460 1460		376,280 0	0 30,000	0		To FY08 From FY06
MA 33-3 O'Shea House	Elevator upgrades	1460		0	90,000	0		From FY06
MA 33-5 Morse Apts.	Elevator upgrades	1460		0	50,000	0		From FY06
MA 33-7 Kickham Apts.	Elevator upgrades	1460		0	196,578	0		From FY06
H.A.-Wide	Computer Learning Center Staff	1408		25,000	25,387	25,387	25,387	On-going
	Section 3 Coordinator	1408		4,000	4,044	4,044	4,044	On-going
	Peer Leadership Program	1408		30,000	30,146	30,146	30,146	Completed
	Special Initiatives	1408		36,000	35,423	35,423	35,423	In progress
	Administration	1410		54,062	54,062	54,062	54,062	On-going
	Energy Audit	1430		6,555	6,555	6,555	0	RFP
	A/E Fees for Elevators	1430		8,723	8,723	8,723	0	Design
	Misc. fees & costs	1430		0	2,000	1,001	1,001	

Annual Statement/Performance and Evaluation Report

Attachment h

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: Brookline Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06P033501-06 Replacement Housing Factor Grant No:	Federal FY of Grant: 2006
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: **9-30-06**
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	105,996	105,996	0	
3	1408 Management Improvements	105,996	105,996	93,328	47,395
4	1410 Administration	52,998	52,998	52,998	52,998
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	71,568	71,568	25,527	
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	193,422	193,422	0	
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2-20)	529,980	529,980	171,853	100,393
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	25,000	25,000		
24	Amount of line 21 Related to Security –Soft Costs				
25	Amount of Line 21 related to Security-- Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

PHA Name: Brookline Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P033501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
MA 33-1	Elevator Upgrades	1460		10,000	10,000	0		Design
Walnut St. Apts.								
MA 33-2	Elevator Upgrades	1460		30,000	30,000	0		Design
Sussman House	A/E for wood façade/building envelope	1430		0	15,527	15,527	0	Design
MA 33-3	Elevator Upgrades	1460		60,000	60,000	0		Design
O'Shea House								
MA 33-5	Elevator Upgrades	1460		30,000	30,000	0		Design
Morse Apts.								
MA 33-7	Elevator Upgrades	1460		63,422	63,422	0		Design
Kickham Apts.	A/E for site contamination clean-up	1430		0	10,000	10,000	0	On-going
H.A.-Wide	Operations	1406		105,996	105,996	0		
	Computer Learning Center Staff	1408		57,350	56,214	49,617	21,423	On-going
	Section 3 Coordinator	1408		6,768	9,213	8,113	2,551	On-going
	Peer Leadership Program	1408		13,928	14,103	14,103	14,103	Completed
	Special Initiatives Coordinator	1408		27,950	26,466	23,167	9,318	On-going
	Administration	1410		52,998	52,998	52,998	52,998	On-going
	A/E Fees and misc. costs	1430		71,568	46,041	0		Design

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

PHA Name: Brookline Housing Authority	Grant Type and Number Capital Fund Program No: MA06P033501-06 Replacement Housing Factor No:	Federal FY of Grant: 2006
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Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
MA 33-1	7/17/08			7/17/10			
MA 33-2	7/17/08			7/17/10			
MA 33-3	7/17/08			7/17/10			
MA 33-5	7/17/08			7/17/10			
MA 33-7	7/17/08			7/17/10			
HA-Wide:							
Mgmt. Imp.	7/17/08			7/17/10			
Fees & Costs	7/17/08			7/17/10			

Substantial Deviation or Significant Amendment or Modification to the Annual Plan

A substantial change to the annual plan would include any changes not previously raised and discussed with the Resident Advisory Board that would impact application preferences and selection order, changes in lease provisions, rent calculation or tenant grievances or modifications to the Capital Improvements Program (Modernization). Other policies included in this modification would include other critical elements of the Annual Plan including policies on pets, conversion to homeownership, demolition and disposition of public housing and community service. Further, all amendments will be reviewed and discussed as part of the subsequent years annual plan

The BHA will convene a meeting of the RAB and hold a public hearing prior to Board adoption.

Amendments to the Annual Plan will be submitted to HUD for their review with a summary or copy of written comments of the RAB.

*** Not included in the 5-year plan**

BHA Annual Plan Progress Statement

Applications

1. Vacancies for the year were: Family (High and Egmont, Trustman and 22 High)-52. Re-occupancy included 12 transfers, 8-TANF/DHCD, 14 local and 20 Priorities. Total 49 units. Past averages were 36-40 range. Vacancies included 6 evictions and 5 known home purchasers. Notably high was High St. Vets with 24 vacancies.
2. Vacancies- Elderly (Sussman, O'Shea, Morse, Kickham and Floyd) - 35 vacancies with re-occupancy by 4 transfers and 20 locals. Past averages 36-40. Vacancies included 3 evictions.
3. **In 2006 we had a goal of re-occupancy of all units in 45 days or less.** Missing that target was High St. Vets -60 days with family death, slow to move out, Egmont St @ 70 days eviction and very poor condition, Col Floyd @ 80 days, death in apartment, poor condition and 2 refusals, 61 Park @ 62 days from eviction and 2 refusals, Morse @ 60 days with unit in poor condition and 190 Harvard @ 105 days with 2 refusals during period of being short staffed
4. **In 2006 we had a broad goal to communicate with applicants via the email.** We have updated all our forms to include email contact for applicants, we have not developed as fully as I would have liked. We will continue this option this year.
5. Applications received and processed for the Year 1212 with 84 local for conventional housing (family list for 2 and 3 bedroom apartments closed in September)

Management

1. **Vacancies at 45 days or less- please see applications 1, 2 and 3 above**
2. **Goal : Rent Collected for year at 98% elderly and 95% for family:** Actual for elderly was 100% and for families was 102%. These numbers are not closed out until our fiscal year close in March. There is apparently a number of credits and prepaid in the system that will be adjusted. It is my hunch that elderly rents are at 98% and family rents at approximately 95%. We did have a good year on rents, but not that good. I will continue to clarify for our fiscal year end.

3. Designated Housing Update for the year:

<i>Location</i>	<i>80/20 Ratio</i>	<i>1/06</i>	<i>12/06</i>
Walnut St	19/5	13/11	11/11
50 Pleasant	77/19	72/23	72/22
61 Park	75/19	72/23	72/22
90 Longwood	75/19	60/32	64/27

Other Management Accomplishments

1. **Goal: rewrite management handbooks for new all residents-100% complete.**
2. **Implement HUD required UIV (Upfront Income Verification) -100% complete**
3. **Improve coordination and follow up for unit's not passing annual inspection for housekeeping or other social issues (hoarding, mental capacity etc) - Improvement made forms and follow up complete, monitoring of progress is a partial missing element that we will continue to work out.**
4. **Improved emphasis on resident responsibilities for guests, income declaration and respect for property- ongoing.**
5. Renegotiation of parking leases along Dummer St with overdue increase (\$105. per month for 16 spaces.
6. Hallway problems particularly at Trustman persist. We have chased kids, brought in families, evicted families, provided some restoration, but this will continue to be a management challenge.
7. Re-bid laundry services at all locations with minimal increase, saved utilities, equipment upgrades and improved return to BHA.
8. Responses to springtime "Gang Activity" at Trustman.
9. Department is now submitting their own 50058's (for the most part), will assign ownership to property managers. These are monthly rent, income and family composition forms, previously done through Section 8 and BHA computer coordinator (position abolished).
10. We have also made good progress in re-doing monthly management reports in anticipation of project budgeting. Site reports are formatted for specific information on vacancies, rent collection, court issues, "problem" areas and community activities. These are reviewed and compiled by Matt for a report to myself and the Board. While still some work in progress, it will become the foundation of in house trainings for site based management and accounting.
11. An important player in management success is our association and representation through the Brookline Court. Again, I am generally very pleased with the responses and success in Court. Special recognition to the managers, and our management lawyer, Jeff Driscoll.

Maintenance Issues and Achievements

1. **Goal: training and thoroughness on worker order close out of work orders. Unsuccessful with loss of foreman in March, 2 foreman offices set, computers and access installed, will review for 2007.**
2. **Goal: Add young blood and improve skill sets; Hired new plumber, new mechanic and principal clerk and all have done well although we need to expand training of plumber for improved HVAC skills.**
3. **Goal: Site based accounting is completed for labor, contract costs but still need to determine best method for consumable supplies.**
4. **Goal: Prepare bid documents for painting of common areas and units, trash and recycle and elevator. Painting spec is 90% complete, holdover for elevator as we will be putting upgrades out to bid in Spring 2007 and all will be under construction or warranty contracts through 2009.**
5. **Goal: Implement safety recommendations-complete.**
6. **Goal: Standardize vacancy turnover/preventative maintenance issues-still in progress.**

Other Maintenance Issues

1. Removal of old storage from hallways and basements at High and Egmont Streets.
2. Selective outsourcing to complement the availability and energy of staff in custodial, grounds, and vacancy preparation.

Leased Housing

1. Extraordinary year with 99.5% utilization of voucher months and 98.8% utilization of available dollars. **Goal for 2006 was 98.5%.**
2. **Goal local landlord outreach session to explain benefits of Section 8- not accomplished.**
3. **Goal: bring unofficial project base into compliance with new regulations: Program advertised for outreach, but unable to follow through properly to do other time demands.**
4. Achieved High Performer status under SEMAP for 2006 fiscal year.

Community Service Activities

1. **Goal: Grand openings of the Creative Arts rooms at High St and Trustman-Trustman to open with Drum class in January 2007.**
2. BHA Scholarship Award at \$7,000
3. KIDS Fair for summer camp scholarships
4. cookouts at all locations
5. 4 graduates in BHA / TANF Program
6. Successful Thanksgiving Day Dinner
7. Distribution of \$900 in Holiday Food Card
8. Distribution of Toys with Runkle School and The Country Club
9. Maintain partnerships and expanded NEXT STEPS program to 4 days per week
10. Successful Summer Employment Program
11. New Computers at Learning Centers at 22 High and Trustman (Foundation to be Named Later)

Personnel Issues

1. **Goal: Staff reorganization to achieve additional capacity to manage CDBG and other projects. This was completed in the fall rather than spring of 2006 due to hiring difficulties. Chris has received about 50% of training and has administered a couple of smaller jobs. Special Projects on bidding trash, rooftop antennae etc to follow this year.**
2. Welcome new staff Stephanie, Jose, David, Brenda and Man.
3. Family issues and staff with some extended leaves for sickness, injury, birth and death: Brian, Maureen, Steve, Sue, Nery, Vin, John, Geri, George Jack, Fred, Mark and Nick.
4. Full day training session for all staff on customer service, Integrity and Teamwork with Leo Dower.
5. Senior Staff training on Legal issues with Attorney John Carey.
6. Most staff also received a day or so of training from Mass NAHRO, MAHAMS (maintenance), IREM, Mass Housing, or Nan McKay Assoc. etc

Computerization

1. **Goal: BHA website Version #1- up and running and will broaden in 2007.**
2. **Goal: Improved Communication with resident via internet. We have had good progress with managers; maintenance and administration receiving regular emails-will look for expansion.**
3. **Goal: Translation services: will carry next year. Programs area available, some reluctance in wanting to purchase additional computers for front desk and train staff as we have been short handed. Also, computer coordinator position deleted from 2007 BHA budget, so consultant time limited.**

Development

1. **Goal: Explore development possibilities for 50 Pleasant, Trustman and 22 High/Walnut Parking lot. Proposals for Trustman and 50 Pleasant explored, further follow up needed from Board.**
2. **Goal: Non Profit- No Progress**

Administration

1. Work up toward and filing of litigation versus Commonwealth of Mass with Boston and Cambridge Housing Authorities.
2. Procurement of Electricity for federal programs saving an estimated \$125,000.
3. Continued affordable contract negotiations with AFSCM, Teamsters and Senior Staff.
4. No issues in Program audits, but continued failure on REAC Inspection.
5. Congratulations to all involved in second place finish in Federal Home Loan Bank Competition to develop affordable housing at Sussman. One of the few fun projects for 2006.
6. I did remove from the priority list the changing of Banks over the past year. While this is something, I would personally prefer Bank of America did void all services fees and establish a local liaison that had made this a priority problem in the past.

2006 Work Completed

22 High and Walnut

Paint Halls and Corridors (a)	
Re-Point masonry, concrete, paint balconies	\$250,000
Windows (low rise) CDBG	\$100,000

50 Pleasant

Paint Halls and Corridors (a)

61 Park

Paint Halls and Corridors (a)

90 Longwood

Paint Halls and Corridors (a)

190 Harvard

Paint Halls and Corridors (a)	
Replace Windows	\$200,000
Renovate Entry	\$60,000
(a) hallway Painting	\$130,000
Total Federal	\$740,000

Col. Floyd

Paint Balcony overhang, columns (CDBG)	\$42,000
Replace Fire Alarm and Emergency Cords	\$200,000
Benches, Fencing and Planting (CDBG)	\$70,000

High St Vets

Egmont St. Vets

Replace fencing (CDBG)	\$40,000
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Trustman

Complete Site (erosion, playgrounds) CDBG	\$160,000
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1057 Beacon

Replace stairs	\$14,000
Replace weathered doors	\$8,000

Total State	\$512,000
All Properties: Carbon Monoxide Monitors	\$50,000

Total Combined \$1,302,000 / 910 units = \$1,430 per unit

BHA Annual 2007 Plan

As required under the Violence Against Women Act of 2005, the Brookline Housing Authority has advised all households that they may not be evicted or denied housing because they are victims of domestic violence. This has been completed in all federally assisted housing and recipients of Section 8 Assistance. Leases and amendments have been changed outlining this provision. Further, the BHA has informed all Section 8 landlords of this law and amended the Housing Assistance Contract to include the laws provisions.

Program Directors, family application staff, and housing managers have been trained in the provisions and protections of the Act.

Brookline Housing Authority Staff participate in the Norfolk County Roundtable against Violence held at the Brookline District Court for purposes of information and networking for referral. BHA management and application staff meet monthly to discuss issues and with the Brookline Center, for the possibility of client referral. BHA site management staff meets bi-monthly with the Brookline Police and follow-up on police incidents. Both parties use the Brookline Center and the Courts for referral of possible or known issues of domestic violence. With reasonable evidence, claim or request, trespass writs are assigned to batters', stalkers, aggressors or perpetrators of domestic violence.

For purpose of application, BHA has provided preference to persons fleeing domestic violence in the Section 8 program.

Copies of HUD form 50066 are available at BHA site management offices