

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
MA031

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# Somerville Housing Authority's PHA Plans

5 Year Plan for Fiscal Years 2008 – 2012  
Annual Plan for Fiscal Year 2008

**OriginalDate of Submission: January 11, 2008**  
**Version 8: May 12, 2008**

**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:** Somerville Housing Authority

**PHA Number:** MA 031

**PHA Fiscal Year Beginning:** April 2008

**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 PHA
- PHA development management offices
- PHA local offices
- www.SHA-web.org

**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 PHA
- 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 PHA
- PHA development management offices
- Other (list below)  
www.SHA-Web.org

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**5-YEAR PLAN**  
**PHA FISCAL YEARS 2008 - 2012**  
[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 PHA's mission is:  
The goal of the Somerville Housing Authority is to assist low and moderate-income families, elderly and disabled, and help them obtain affordable housing that is safe, decent, and sanitary. And in so doing, to advocate for and serve the needs of our residents and to encourage and assist all those whom can achieve maximum independence to do so.

Through our efforts we will create and expand affordable housing opportunities for the diverse population of Somerville residents.

We will create and encourage resident self-sufficiency and independence.

We will efficiently allocate our resources encouraging innovation while working together as a team.

We will foster respect for residents, co-workers, and community.

**Statement of Progress:**

During the past year, the Authority has worked towards achieving its established goals identified in our Mission Statement and in our previously submitted Five-Year Plan.

The SHA continues to look at various ways to increase the quality and supply of affordable housing. The SHA, plans to construct a new 95 unit elderly facility during this 2008 reporting period with completion and occupancy scheduled for late 2009. This development will take 64 antiquated State Public Housing units off-line and construct a new 95 unit Senior housing facility which will create 31 additional units to the SHA portfolio. The new development will be state of the art and energy efficient and will provide our residents a service enriched living environment through an innovative partnership with an adjacent facility owned and operated by the Visiting Nurses Association. SHA continues its partnership with our municipality and the CDBG/HOME funded Community Development office. We have established a program to provide property owners with home improvement grants to repair property that will be preserved for voucher holders. The SHA has improved the quality of life in housing by focusing efforts on improved customer service by responding to all resident concerns within a reasonable time frame and following-up with satisfaction surveys. We have implemented our Language Assistance Plan for Limited English Proficiency residents and will continue to seek improvements in this area.

The SHA continues to renovate units to the highest possible standard upon vacancy. Our public housing inspector maintains extensive inspection records and diligently performs semi-annual LUT's to UPCS standards. We have also identified and earmarked extensive modernization improvements from our capital fund program where routine maintenance is inadequate. This is supported by the fact that in our most recent REAC Physical Inspection the SHA again achieved a ranking as a High performer.

The SHA has been awarded a Family Self Sufficiency program for public housing residents. This program is designed to allow residents to become self sufficient and to take the steps necessary to achieve independence. The program provides support and assistance to the entire family. The SHA has hired an FSS coordinator. This coordinator helps the family obtain the services necessary to achieve the goals listed in the resident's service plan.

The SHA consistently reviews our financial position to ensure that adequate resources allow us to meet our goal of providing decent, safe and sanitary housing for all residents. We continue to enhance supportive services programs that lead to employment opportunities for our unemployed residents and to ensure that all residents have equal access to assisted housing under affirmative action. Our preference for hiring residents has resulted in the recruitment and training of numerous previously unemployed public housing residents.

SHA adopted our VAWA plan on July 11, 2007 and continues staff training and discussions in order to achieve our stated goals.

*This Policy has the following principal goals and objectives:*

*Maintaining compliance with all applicable legal requirements imposed by VAWA;*

*Ensuring the physical safety of victims of actual or threatened domestic violence, dating violence, or stalking who are assisted by SHA;*

*Providing and maintaining housing opportunities for victims of domestic violence dating violence, or stalking;*

*Creating and maintaining collaborative arrangements between SHA, law enforcement authorities, victim service providers, and others to promote the safety and well-being of victims of actual and threatened domestic violence, dating violence and stalking, who are assisted by SHA; and Taking appropriate action in response to an incident or incidents of domestic violence, dating violence, or stalking, affecting individuals assisted by SHA. (SEE ATTACHMENT)*

**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**

The Somerville Housing Authority's strategic goal is to increase the availability of decent, safe, sanitary and affordable housing and expand the supply of assisted housing objectives by:

- Developing a new 95 unit elderly facility at an existing and antiquated state-owned 64 unit elderly public housing site. The new Capen Court development is expected to leverage more than \$10 million dollars in private equity. With approximately \$6.6 million in public funding, SHA believes this is an example of an innovative approach to preserving and creating affordable housing opportunities.
- Continuing to explore innovative approaches by working with local, regional and state government authorities for property acquisitions through competitive or disposition opportunities.
- Applying for additional rental vouchers if the SHA has determined that existing staff can handle the extra caseload and/or funding is available to support the need of extra staff.



**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)

**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: Review the public housing family development rental income along with development cost to ensure that the rental income and operating subsidies allow the development to meet the SHA's goal to provide decent, safe and sanitary housing to its residents.
- Seek funds to fully implement a "Building Watch" program that enlists residents to assist the SHA in maintaining and improving our buildings and promoting increased daily communication with and between all SHA divisions.

**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)
- SHA will take steps to assess and implement a policy to address Reasonable Accommodations requests. SHA will explore available funding opportunities to increase resident services staff with an emphasis on accessibility concerns.

**Other PHA Goals and Objectives: (list below)**

Other: (list below) Implementation of affirmative measures to comply with section 603 in Title VI of Violence against Women Act. PIH 2006-23. The SHA revised policy is attached which has outlined our goal to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking.

Annual PHA Plan  
PHA Fiscal Year 2008  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

Standard Plan

**Streamlined Plan:**

- High Performing PHA
- Small Agency (<250 Public Housing Units)
- Administering Section 8 Only

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.

**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.

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MA031i	Violence against Women Policy	

**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)

Optional Attachments:

- PHA Management Organizational Chart
- 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

**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.

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	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
X	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
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	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
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	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
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	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
X	Public housing grievance procedures <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	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
X	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
X	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
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	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
X	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)]

Addressed in Supporting Documentation

**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	5,359	5	4	4	5	5	4
Income >30% but <=50% of AMI	3,525	5	4	4	5	5	4
Income >50% but <80% of AMI	5,070	5	4	4	5	5	4
Elderly	4,241	5	4	4	5	5	4
Families with Disabilities	2,868	5	4	4	5	5	4
Race/Ethnicity C	10,509	5	4	4	5	5	4
Race/Ethnicity B	952	5	4	4	5	5	4
Race/Ethnicity H	865	5	4	4	5	5	4
Race/Ethnicity A	664	5	4	4	5	5	4

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: 2005
- 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)

**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 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/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	4,221		PH: 11%
Extremely low income <=30% AMI	3,729	88%	
Very low income (>30% but <=50% AMI)	420	10%	
Low income (>50% but <80% AMI)	69	2%	
Families with children	2,674	63%	
Elderly families	101	2%	
Families with Disabilities	684	15%	
Race/ethnicity W	1,216	29%	
Race/ethnicity B	1,526	36%	
Race/ethnicity Am I	25	0.00%	
Race/ethnicity H	1,024	24%	
Race/ethnicity As P	192	5%	
Race/ethnicity Other	238	6%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	1,547	37%	
2 BR	2,026	48%	
3 BR	498	12%	
4 BR	147	3%	
5 BR	6	0%	
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 checked="" type="checkbox"/> Yes			
Emergencies			

1

**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.

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	70,200		
Extremely low income <=30% AMI	68,005	96.87%	
Very low income (>30% but <=50% AMI)	2,456	3.50%	
Low income	150	0.21%	

Housing Needs of Families on the Waiting List			
(>50% but <80% AMI)			
Families with children	25,140	35.81%	
Elderly families	3,977	5.67%	
Families with Disabilities	23,256	33.13%	
Race/ethnicity W	32,283	45.99%	
Race/ethnicity B	13,244	18.87%	
Race/ethnicity H	22,797	32.47%	
Race/ethnicity AI	1,256	1.79%	
Race/Ethnicity Asian	2,125	3.03%	Race/Ethnicity Asian
Race/Ethnicity Other			Race/Ethnicity Other
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			

**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)

- contingent upon being penalized by PHAS.
- Develop the new Capen Court elderly facility which will replace 64 antiquated units and construct a new 95 unit elderly facility through the use of mixed financing.

**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)
  - Administer wait lists.

**Need: Specific Family Types: Families at or below 40% 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)
  - Administer wait lists.

**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 (contingent upon being penalized by PHAS).
- 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 contingent upon being penalized by PHAS.
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)

**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.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2007 grants)</b>		
a) Public Housing Operating Fund	\$ 1,322,959	
b) Public Housing Capital Fund	\$ 749,956	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$ 12,867,052	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants	\$65,500	
h) Community Development Block Grant	82,574	Public Safety
i) HOME		
Other Federal Grants (list below)		
Shelter Home Care Grant	\$106,000	Housing for McKinney Homeless Individuals
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
	0	0
	0	0
<b>3. Public Housing Dwelling Rental Income</b>		
	\$1,795,631	Actual Rents 3/31/07
<b>4. Other income (list below)</b>		
Interest Income	\$194,577	Operations 3/31/07

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
Section 8 SRO	85,017	Operations sec 8
Section 8 New Construction	260,082	Operations sec 8
Sec 8 Voucher-mobility fees 3-31-07 *	32,414	Operations sec 8
Low Rent – laundry revenues 3-31-07 *	12,006	Operations low rent
Business Activities		
Toy Drive donations *	4541	Operations
Rent/Tuition *	3860	Operations
Other *	9040	Operations
<b>4. Non-federal sources (list below)</b>		
State Subsidy	\$1,590,659	Operations State Housing
MRVP	\$4,760	Operations MRVP
State Local –laundry revenues *	37,805	Operations
Cell Tower Revenues *	249,306	Operations
State Rental Income	\$3,486,898	Operations State Housing
<b>Total Resources</b>	<b>\$22,960,637</b>	

**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 Within the Top 20)
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe) Combination Method based upon BR size/# of vacancies/wait list history.

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 – Ins Background review

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) (applying for)

**(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?

- PHA main administrative office
- PHA development site management office
- Other (list below)  
Mystic Activity Center-Tenant Selection Office

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 (3) Assignment

1. How many site-based waiting lists will the PHA operate in the coming year? **6(six)**

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? **6 (six)**

3.  Yes  No: May families be on more than one list simultaneously?  
If yes, how many lists? **1-6**

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)

**Mystic Activity Center-Tenant Selection Office**

**(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 **Family**
- Two **Elderly**
- 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: Not applicable to family developments.

- **Applicable to Federal elderly developments only.**

**(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?

- \*We most likely will exceed because our wait list indicates that more than 40% of all applicants have income below 30% of area median 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, Property Disposition)
- Victims of domestic violence
- Substandard housing (Condemnation)
- 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)

- **Handicapped/Disability Preference**
- **Victims of Katrina**

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:

- 3 Involuntary Displacement (Disaster, Government Action,
- 4 Action of Housing Owner
- 6 Victims of domestic violence
- 6 Substandard housing (Condemnation)
- 5 Homelessness
- High rent burden

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- 2  Residents who live and/or work in the jurisdiction
- Veterans and veterans' families
- 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-Displaced for development of SHA owned property
  - 6 acute medical emergency
  - 7 SHA transfer
  - 9 (a) Handicapped/Disability Preference
  - 9 (b) Elderly
  - 8 Veteran Preference
  - 1 - Victims of Katrina

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

**(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)
- SHA Web Site – [www.SHA-web.org](http://www.SHA-web.org)

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: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete.

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
  - SHA has only one federal family development.
- 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

- SHA has only one federal family development.

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)

Income, Family Composition, citizenship or citizen eligibility.

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)

- Resident name, Current Address, Current Landlord name and address, and any other HUD requirements.

**(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)

- PHA main administrative office
- Other (list below)
- Mystic Activity Center – Tenant Selection Office

**(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: **Voucher holders are granted 60 days at issuance and 2 possible concurrent extensions of 30 days not to exceed 120 days providing an applicant can demonstrate diligent search effort. Tolling will occur in case of discrimination complaint, confinement in the hospital or the like, medical reasons, submissions of a request for tenancy approval, as a reasonable accommodation, and for other extenuating circumstances.**

**(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 (Condemnation)
- 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)
  1. Capen Court residents being displaced due to construction of new facility
  2. SHA Transfer.
  3. Emergency Applicants which include residents who are paying >50% of gross income towards rent and utilities.
  4. Displaced by City of Somerville

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

- 2 Involuntary Displacement (Disaster, Government Action,,
- 3 Action of Housing Owner
- 3 Victims of domestic violence
- 2 Substandard housing (Condemnation)
- Homelessness
- 3 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
- 1 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. Displaced Capen court Residents**
  - **4.SHA Transfers.**
  - **3. Emergencies which include residents who are paying >50% of gross income towards rent.**
  - **5. Veterans**
  - **2. Involuntary displacement (natural disaster, code enforcement, owner action/no fault eviction); Victim of Domestic Violence, substandard housing, homeless, rent burden.**

1. 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) Somerville Community Access Television local media, minority publications, other social service agencies, other affiliated government agencies, web site

**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)
  - A deduction from income for Educational expenses up to a maximum of \$1,000 per year.
  - Exclude earned income of all children under 21 years of age who have a high school diploma or GED

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)
- 95<sup>th</sup> 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
- Any time a family experiences an income increase above a threshold amount or percentage > 10%
- Other (list below)

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)  
Annually published FMR, as of October 1

**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).

The Somerville Housing Authority will operate a project-based voucher program using up to 20 percent of its budget authority for project-based assistance. Except as otherwise noted or prohibited, the SHA policies for the tenant-based voucher program contained in the Administrative Plan also apply to the project-based program.

Somerville is historically one of the most densely populated cities in the country with 80,000 people residing in four square miles. Our low vacancy rate (estimated at 1%) contributes to our affordable housing shortage. Our limited housing supply combined with our proximity to Boston has forced rents to remain among the highest in Massachusetts. Attaching funding to specific units rather than using all budget authority for tenant-based assistance facilitates the need to increase the supply of affordable units in Somerville. As such, project basing is consistent with the stated needs of Consolidated Plan of the city of Somerville as well as the goals of our Annual Plan.

The SHA is aware that it may only project base vouchers if consistent with its PHA Plan and the goal of deconcentrating poverty and expanding housing opportunities. The SHA will consider a proposed PBV site if it is consistent with the following deconcentration goals:

The housing site must be consistent with the deconcentration goals already established in the SHA's PHA plan and with civil rights laws and regulations, including HUD's rules on accessibility at 24 CFR 8.4 (b)(5). The SHA will evaluate each proposal based on whether the site is in an Enterprise Zone, Economic Community or Renewal Community (EZ/EC/RC); whether the concentration of assisted units will or has decreased as a result of public housing demolition; whether the census tract is undergoing significant revitalization; whether government funding as been invested in the area; whether new market rate units are being developed in the area, which are likely to positively impact the poverty rate in the area; if the poverty rate in the area is greater than 20%, whether in the past five years there has been an overall decline in the poverty rate; and whether there are meaningful opportunities for educational and economic advancement in the area. The SHA will only award PBV assistance to projects consistent with the goal of deconcentrating poverty and expanding housing and economic opportunities. The SHA will determine that the site is suitable from the standpoint of facilitating and furthering full compliance with the applicable Civil Rights Laws, regulations and Executive Orders, and that the site meets the Housing Quality site and neighborhood standards at 24 CFR982.401(1).Ft

The SHA will select PBV proposals based on a public competition. The selection criteria is reflected in the SHA's Section 8 Administrative Plan and is available for public viewing. The SHA may opt not to conduct a separate competition if proposals presented to the SHA were accepted as part of a different competition for federal funds (HOME, HOPE VI, Tax Credits) within 3 years of the PBV proposal selection date. The original competition, however cannot have considered the possibility of future PBV assistance, but the selection must be based on the project's merits at the time of the competition. The SHA may give a preference to Community Housing Development organizations or projects with Low Income Housing Tax Credits. The Somerville Housing Authority may submit a proposal for a project which it owns or manages subject to HUD approval of the selection process.

**(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)

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)

- **SHA has been determined a HIGH PERFORMER Authority.**

**A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)

- An organization chart showing the PHA's management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:

**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	421	11%
Section 8 Vouchers	1034	10%
Section 8 Certificates		10%
Section 8 Mod Rehab	N/A	10%
Special Purpose Section 8 Certificates/Vouchers		10%
DHAP	150	5%
Mainstream	100	5%
SRO	13	10%
		N/A
Other Federal Programs(list individually)		

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

**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.

**SHA has been determined a HIGH PERFORMER Authority**

**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)

- PHA main administrative office
- 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
- 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.

CFP funding may only be utilized at the Administration Building and Mystic Activity Center upon written approval by HUD of the inclusion of either or both buildings under the Declaration of Trust.

**(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:

-or-

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

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150105 Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant: 2005
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Performance and Evaluation Report for Period Ending: 6-30-2007                   xx <input type="checkbox"/> 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	160,900		160,900	160,900
3	1408 Management Improvements	120,000		92,276	92,276
4	1410 Administration	80,450		80,450	80,450
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	20,000		23,514	23,514
8	1440 Site Acquisition				
9	1450 Site Improvement	30,000		127,802	127,802
10	1460 Dwelling Structures	338,108		302,422	302,422
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	30,044			
13	1475 Nondwelling Equipment	25,000		17,138	17,138
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)	804,502		804,502	804,502
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	100,000		18,748	18,748

<p><b>Annual Statement/Performance and Evaluation Report</b>  <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b>  <b>Part II: Supporting Pages</b></p>
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PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150105 Capital Fund Program Grant No: 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	Funds Obligated	Funds Expended	
31-1 a	AE Fees	1430		5,000		19,939	19,939	
31-1 b	Kitchen/Bath-phase 2	1460		162,108		80,937	80,937	
31-1c	Exterior Elec Receptacles	1460		46,000		0	0	
	Hallway rep 31-1	1460				6410	6410	
	Ext Painting 31-1	1460				185,201	185,201	
31-2a	AE Fees	1430		5,000		0	0	
31-2b	Boiler rm Rep & Imp	1460		10,000		0	0	
31-2c	TV master Ant	1460		40,000		0	0	
31-3a	AE Fees	1430		5,000		0	0	
31-3 b	Boiler Room Repl & Imp	1460		20,000		0	0	
31-2c	Hallway Imp	1460		10,000		7,150	7,150	
31-7a	AE Fees	1430		5,000		3,575	3,575	
31-7b	Boiler rm Repl & Imp	1460		50,000		0	0	
31-7c	DHW imp-31-7	1460				9,932	9,932	
31-7d	Ceiling Imp 31-3	1460				12,792	12,792	
	OPERATIONS	1406		160,900		160,900	160,900	
31-1	SITE IMPROVEMENTS 31-1	1450		27000				
31-2	Site Improvements 31-2	1450		1000				
31-3	Site Improvements 31-3	1450		1000				
31-7	Site Improvements 31-7	1450		1000				
31-1d	Replace Handicap Ramp	1450				5300	5300	
31-1e	Repair plaster, sheet rock common area hallways	1450				26,500	26,500	
31-1f	Replace concrete sidewalk	1450				53,855	53,855	
31-1g	Replace ballast emergency lighting	1450				9000	9000	
31-1h	Hardwire smoke detectors w battery back up	1450				15,380	15,380	
31-2d	Hardwire smoke detectors w battery back up	1450				3317	3317	
31-3c	Hardwire smoke detectors w battery back up	1450				5730	5730	
31-7c	Hardwire smoke detectors w battery back up	1450				5730	5730	
31-3d	Replace fencing	1450				2990	2990	
HAWc	Admin Bldg Imp	1470		30,044		0	0	
HAWd	Upgrades Computers/Equip	1475		25,000		17,138	17,138	
HAW e	Equip for Mod Dept	1408		10,000		0	0	
HAW f	Board & Staff Training	1408		25,000				
	Nahro Conferences – Miscell Housing Issues – Exec Director – Commissioners – Sr Staff	1408				16918	16918	
HAW g	Energy Consv Studies	1408		20,000		18,748	18,748	
HAW h	Activity Center Coor	1408		25,000		8,552	8,552	
HAW I	HTVN Subscription	1408		7,000		2500	2500	
HAW j	Resident & Youth Training Activities	1408		30,000		39,008	39,008	
HAWk	Asset Based convesion-ongoing	1408		3000		6550	6550	
HAW l	Mod Dept Salaries & Benes	1410		80,450		80,450	80,450	

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

PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150105 Capital Fund Program Grant No: 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	Funds Obligated	Funds Expended	
Total				804,502		804,502	804,502	

Annual Statement/Performance and Evaluation Report							
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)							
Part III: Implementation Schedule							
PHA Name: Somerville Housing Authority			Grant Type and Number MA06P03150205 Capital Fund Program No: Replacement Housing Factor No:			Federal FY of Grant: 2005	
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	
31-1 a	9-30-2007			9-30-2008			
31-1 b	"			"			
31-1 c	"			"			
31-1 d	"			"			
31-1 e	"			"			
31-1f	"			"			
31-1 g	"			"			
31-1 h	"			"			
31-2 a	"			"			
31-2 b	"			"			
31-2 c	"			"			
31-2 d	"			"			
31-3 a	"			"			
31-3 b	"			"			
31/3 c	"			"			
31-3 d	"			"			
31-3 e	"1			"			
31-7 a	"			"			
31-7 b	"			"			
31-7 c	"			"			
31-7 d	"			"			
31-7 e	"			"			
HAW a	"			"			
HAW b	"			"			
31-1d	"			"			
31-1e	"			"			
31-1f	"			"			
31-1g	"			"			
31-1h	"			"			
31-2d	"			"			
31-3c	"			"			
31-7c	"			"			
31-3d	"			"			
HAW c	"			"			
HAW d	"			"			
HAW e	"			"			
HAW f	"			"			
HAW g	"			"			

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part III: Implementation Schedule</b>							
PHA Name: Somerville Housing Authority		Grant Type and Number MA06P03150205 Capital Fund Program No: Replacement Housing Factor No:				Federal FY of Grant: 2005	
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	
HAW h	“			“			
HAW I	“			“			
HAW j	“			“			
HAW k	“			“			

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150106 Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant: 2006
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Performance and Evaluation Report for Period Ending: 6-30-07 <input type="checkbox"/> 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	142,327		142,327	142,327
3	1408 Management Improvements	120,000		94,431	94,431
4	1410 Administration	77,185		73,393	73,393
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	20,000		6,130	6,130
8	1440 Site Acquisition				
9	1450 Site Improvement	10,000		0	0
10	1460 Dwelling Structures	213,147		16,837	16,837
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	164,187		272,826	272,826
13	1475 Nondwelling Equipment	25,000		18,074	18,074
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	771,846		624,018	624,018
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	60,000		20443	20443

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

PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150106 Capital Fund Program Grant No: 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	Funds Obligated	Funds Expended	
31-1 a	AE Fees	1430		5,000		6,130	6,130	
31-1 b	Kitchen/Bath-phase 3	1460		43147		16,837	16,837	
31-1c	Exterior Elec Receptacles	1460		10,000				
31-1d	Exterior painting of bldgs	1460		100,000				
31-1e	Maint Vehicle Garage	1470		154,187		272,826	272,826	
31-2a	AE Fees	1430		5,000				
31-2b	Boiler rm Rep & Imp	1460		10,000				
31-2c	TV master Ant	1460		10,000				
31-3a	AE Fees	1430		5,000				
31-3 b	Boiler Room Repl & Imp	1460		20,000				
31-2c	Hallway Imp	1460		10,000				
31-7a	AE Fees	1430		5,000				
31-7b	Boiler rm Repl & Imp	1460		10,000				
HAW a	OPERATIONS	1406		142,327		142,327	142,327	
31-1	SITE IMPROVEMENTS 31-1	1450		2500				
31-2	Site Improvements 31-2	1450		2500				
31-3	Site Improvements 31-3	1450		2500				
31-7	Site Improvements 31-7	1450		2500				
HAWc	Admin Bldg Imp	1470		10,000				
HAWd	Upgrades Computers/Equip	1475		25,000		18,074	18,074	
HAW e	Office Equip	1408		10,000		3241	3241	
HAW f	Board & Staff Training	1408		25,000				
	Nahro Conferences – Miscell Housing Issues – Exec Director – Commissioners – Sr Staff	1408				20257	20257	
	Leo Dauwer Training – Miscell housing issues – Exec Dir – Sr Staff – Commissioners	1408				11431	11431	
HAW g	Energy Consv Studies	1408		20,000		20443	20443	
HAW h	Activity Center Coor	1408		25,000		7,794	7794	
HAW I	HTVN Subscription	1408		7,000		2500	2500	
HAW j	Resident & Youth Training Activities	1408		30,000		21864	21864	
HAWk	Asset based convesion-ongoing	1408		3000		6901	6901	
HAW l	Mod Dept Salaries & Benes	1410		77,185		73,393	73,393	

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

PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150106 Capital Fund Program Grant No: 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.	Qua ntity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
Total				771,846		624,018	624,018	

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

PHA Name: Somerville Housing Authority		Grant Type and Number MA06P03150206 Capital Fund Program No: Replacement Housing Factor No:				Federal FY of Grant: 2006	
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	
31-1 a	9-30-2008			9-30-2009			
31-1 b	"			"			
31-1 c	"			"			
31-1 d	"			"			
31-1 e	"			"			
31-1f	"			"			
31-1 g	"			"			
31-1 h	"			"			
31-2 a	"			"			
31-2 b	"			"			
31-2 c	"			"			
31-2 d	"			"			
31-3 a	"			"			
31-3 b	"			"			
31/3 c	"			"			
31-3 d	"			"			
31-3 e	"1			"			
31-7 a	"			"			
31-7 b	"			"			
31-7 c	"			"			
31-7 d	"			"			
31-7 e	"			"			
HAW a	"			"			
HAW b	"			"			
HAW c	"			"			
HAW d	"			"			
HAW e	"			"			
HAW f	"			"			
HAW g	"			"			
HAW h	"			"			
HAW I	"			"			
HAW j	"			"			
HAW k	"			"			

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: SOMERVILLE HOUSING AUTHORITY			Grant Type and Number MA06P03150107 Capital Fund Program Grant No: Replacement Housing Factor Grant No:		Federal FY of Grant: 2007
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 6-30-07 <input type="checkbox"/> Final Performance and Evaluation Report                    6-30-07					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	149,991		0	0
3	1408 Management Improvements	110,000		0	0
4	1410 Administration	74,995		0	0
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	20,000		0	0
8	1440 Site Acquisition				
9	1450 Site Improvement	30,000		0	0
10	1460 Dwelling Structures	329,970		0	0
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	20,000		0	0
13	1475 Nondwelling Equipment	15,000		0	0
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)	749,956		0	0
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	40,000			

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

PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150107 Capital Fund Program Grant No: 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	Funds Obligated	Funds Expended	
31-1 a	AE Fees	1430		5,000		0	0	
31-1 b	Kitchen/Bath-phase 3	1460		214,970		0	0	
31-1c	Exterior Elec Receptacles	1460		10,000		0	0	
31-1d	Exterior landscaping of bldgs	1460		10,000		0	0	
31-2a	AE Fees	1430		5,000		0	0	
31-2b	Boiler rm Rep & Imp	1460		5,000		0	0	
31-2c	Repair structural problems of balconies-loose concrete	1460		10,000		0	0	
31-2d	New Roof	1460		10,000		0	0	
31-3a	AE Fees	1430		5,000		0	0	
31-3 b	Boiler Room Repl & Imp	1460		10,000		0	0	
31-3c	Hallway Imp	1460		5,000		0	0	
31-3d	Repair balcony-loose concrete	1460		10,000		0	0	
31-3e	New Roof	1460		10,000		0	0	
31-7a	AE Fees	1430		5,000		0	0	
31-7b	Boiler rm Repl & Imp	1460		5,000		0	0	
31-7d	Landscape	1460		10,000		0	0	
31-7d	New Roof	1460		10,000		0	0	
31-7e	Ventilation	1460		10,000		0	0	
Amp 1	OPERATIONS	1406		76,495				
Amp 2	OPERATIONS	1406		73,496		0	0	
31-1	SITE IMPROVEMENTS 31-1	1450		7500		0	0	
31-2	Site Improvements 31-2	1450		7500				
31-3	Site Improvements 31-3	1450		7500				
31-7	Site Improvements 31-7	1450		7500				
HAWc	Admin Bldg Imp	1470		20,000		0	0	
HAWd	Upgrades Computers/Equip	1475		15,000		0	0	
Amp 1	Office Equip	1408		2550		0	0	
Amp2	Office Equip	1408		2450				
Amp 1	Staff Training	1408		10,200		0	0	
Amp 2	Staff Training	1408		9,800				
Amp 1	Energy Consv Studies	1408		10,200		0	0	
Amp 2	Energy Cons Studies	1408		9,800				
Amp 1	Activity Center Coor	1408		25,000		0	0	
Amp 1	HTVN Subscription	1408		7,000		0	0	
Amp 1	Resident & Youth Training Activities	1408		15,300		0	0	

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part II: Supporting Pages</b>								
PHA Name: SOMERVILLE HOUSING AUTHORITY			Grant Type and Number MA06P03150107 Capital Fund Program Grant No: 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	Funds Obligated	Funds Expended	
Amp 2	Resident & Youth Training Activities	1408		14,700				
Amp 1	Asset based convesion-ongoing	1408		1530		0	0	
Amp 2	Asset based convesion-ongoing	1408		1470				
HAW 1	Mod Dept Salaries & Benes	1410		74,995		0	0	
Total				749,956		0	0	

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

PHA Name: Somerville Housing Authority		Grant Type and Number MA06P03150207 Capital Fund Program No: 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		
31-1 a	9-30-2009			9-30-2010				
31-1 b	"			"				
31-1 c	"			"				
31-1 d	"			"				
31-1 e	"			"				
31-1f	"			"				
31-1 g	"			"				
31-1 h	"			"				
31-2 a	"			"				
31-2 b	"			"				
31-2 c	"			"				
31-2 d	"			"				
31-3 a	"			"				
31-3 b	"			"				
31/3 c	"			"				
31-3 d	"			"				
31-3 e	"1			"				
31-7 a	"			"				
31-7 b	"			"				
31-7 c	"			"				
31-7 d	"			"				
31-7 e	"			"				
HAW a	"			"				
HAW b	"			"				
HAW c	"			"				
HAW d	"			"				
HAW e	"			"				
HAW f	"			"				
HAW g	"			"				
HAW h	"			"				
HAW I	"			"				
HAW j	"			"				
HAW k	"			"				

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: SOMERVILLE HOUSING AUTHORITY			Grant Type and Number MA06P03150108 Capital Fund Program Grant No: Replacement Housing Factor Grant No:		Federal FY of Grant: 2008
XX <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/>					
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> 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	158,310			
3	1408 Management Improvements	110,000			
4	1410 Administration	79,155			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	20,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	30,000			
10	1460 Dwelling Structures	359,085			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	20,000			
13	1475 Nondwelling Equipment	15,000			
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)	791,550			
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	136,000			

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

PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150108 Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant: 2008			
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	Funds Obligated	Funds Expended	
31-1 a	AE Fees	1430		5,000				
31-1 b	Kitchen/Bath-phase 3	1460		168,085				
31-1c	Exterior Elec Receptacles	1460		10,000				
31-1d	Exterior landscaping of bldgs	1460		10,000				
31-1e	Energy Cons Measures-water	1460		20,000				
31-1f	Energy Cons measures-Insulation	1460		10,000				
31-2a	AE Fees	1430		5,000				
31-2c	Energy Cons Measures – Water	1460		10,000				
31-2d	Energy Cons Measures-Insulation	1460		1,000				
31-3a	AE Fees	1430		5,000				
31-3 b	Boiler Room Repl & Imp	1460		10,000				
31-3c	Hallway Imp	1460		5,000				
31-3d	Structural Repair balcony – loose concrete	1460		10,000				
31-3e	New Roof	1460		10,000				
31-3f	Energy Cons measures-lighting	1460		5000				
31-7a	AE Fees	1430		5,000				
31-7b	Boiler rm Repl & Imp	1460		5,000				
31-7d	Landscape	1460		10,000				
31-7d	New Roof	1460		10,000				
31-7e	Ventilation	1460		10,000				
31-7f	Energy Cons measures-water	1460		5000				
31-7g	Energy Cons measures- ch heat	1460		50,000				
Amp 1	OPERATIONS	1406		80,738				
Amp 2	Operations	1406		77,572				
		1406						
Amp 1	SITE IMPROVEMENTS	1450		15,000				
Amp 2	Site Improvements	1450		15,000				
HAWc	Admin Bldg Imp	1470		20,000				
HAWd	Upgrades Computers/Equip	1475		15,000				
Amp 1	Office Equip	1408		2550				
Amp 2	Office Equip	1408		2450				
Amp 1	Staff Training	1408		10,200				
Amp 2	Staff Training	1408		9,800				
Amp 1	Energy Consv Studies	1408		10,200				
Amp 2	Energy Consv Studies	1408		9,800				
Amp 1	Activity Center Coor	1408		25,000				
Amp 1	HTVN Subscription	1408		7,000				
Amp 1	Resident & Youth Training Activities	1408		15,300				

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part II: Supporting Pages</b>								
PHA Name: SOMERVILLE HOUSING AUTHORITY		Grant Type and Number MA06P03150108 Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant: 2008			
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	Funds Obligated	Funds Expended	
Amp 2	Resident & Youth Training Activities	1408		14,700				
Amp 1	Asset based conversion-ongoing	1408		1530				
Amp 2	Asset based conversion-ongoing	1408		1470				
HAW 1	Mod Dept Salaries & Benes	1410		79,155				
Total				791,550				

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part III: Implementation Schedule</b>							
PHA Name: Somerville Housing Authority		Grant Type and Number MA06P03150208 Capital Fund Program No: Replacement Housing Factor No:			Federal FY of Grant: 2008		
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	
31-1 a	9-30-2010			9-30-2011			
0	"			"			
31-1 c	"			"			
31-1 d	"			"			
31-1 e	"			"			
31-1f	"			"			
31-1 g	"			"			
31-1 h	"			"			
31-2 a	"			"			
31-2 b	"			"			
31-2 c	"			"			
31-2 d	"			"			
31-3 a	"			"			
31-3 b	"			"			
31/3 c	"			"			
31-3 d	"			"			
31-3 e	"1			"			
31-7 a	"			"			
31-7 b	"			"			

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

PHA Name: Somerville Housing Authority		Grant Type and Number MA06P03150208 Capital Fund Program No: Replacement Housing Factor No:			Federal FY of Grant: 2008		
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	
31-7 c	“			“			
31-7 d	“			“			
31-7 e	“			“			
HAW a	“			“			
HAW b	“			“			
HAW c	“			“			
HAW d	“			“			
HAW e	“			“			
HAW f	“			“			
HAW g	“			“			
HAW h	“			“			
HAW I	“			“			
HAW j	“			“			
HAW k	“			“			

### Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name Somerville Housing Authority					<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/H A-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2009 PHA FY: 2009	Work Statement for Year 3 FFY Grant: 2010 PHA FY: 2010	Work Statement for Year 4 FFY Grant: 2011 PHA FY: 2011	Work Statement for Year 5 FFY Grant: 2012 PHA FY: 2012	
<i>31-1 Mystic River</i>	Annual Statement	129,000	85,000	\$125,000	\$105,000	
31-2 Highland Gardens		27,000	36,000	25,000	\$25,000	
31-3 Brady Towers		21,000	\$17,000	\$35,000	11,000	
<i>31-7 Weston Manor</i>		136,000	192,000	145,000	189,000	
CFP Funds Listed for 5-year planning		\$313,000	\$330,000	\$330,000	\$330,000	
Replacement Housing Factor Funds						



**Part II: Supporting Pages—Work Activities**

Activities for Year 1	Activities for Year: 2 FFY Grant: 2009 PHA FY: 2009			Activities for Year: 3 FFY Grant: 2010 PHA FY: 2010		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
<b>See</b>	<b>31-1 Mystic View</b>	<b>Kitchen/Bath Phase 3</b>	67,000	<b>31-1 Mystic River</b>		
<b>Annual</b>		<b>Landscape</b>	10,000		<b>Landscape</b>	10,000
Statement		Exterior Receptacles	2,000		<b>Kitchen-bath phase 4</b>	20,000
		Energy cons Measures – reduce water consumption	20,000		<b>Energy cons Measures – reduce water consumption</b>	20,000
		Energy cons Measures – insulation & weatherstripping	20,000		<b>Energy cons Measures – insulation &amp; weatherstripping</b>	20,000
		Energy cons Measures – upgrade common area lighting	10,000		<b>Energy cons Measures – upgrade common area lighting</b>	10,000
					Exterior receptacles	5,000
	31-2 Highland Gardens	Repair structural problems of balconies w loose concrete	\$5,000	31-2 Highland Gardens	Boiler Rm. Improvements	5,000
					Repair structural problems of balconies w loose concrete	5,000
		New roof	5,000		New roof	10,000
		Energy cons Measures – replace boilers & DHW system	10,000		Energy cons Measures – replace boilers & DHW system	10,000
		Energy cons Measures – upgrade common area lighting	5,000		Energy cons Measures – upgrade common area lighting	5,000
		Energy cons Measures – insulation & weatherstripping	1,000		Energy cons Measures – insulation & weatherstripping	1,000
		Energy cons Measures – reduce water consumption	1000			
	31-3 Brady s	Boiler Imp	5,000	31-3 Brady Towers	Boiler room	1,000
		Repair structural problems of balconies w loose concrete	5,000		Replace Roof	1,000
		New roof	5,000		Repair structural problems of balconies w loose concrete	10,000
		Energy cons Measures – upgrade common area lighting & apartments	5,000		Energy cons Measures – upgrade common area lighting & apartments	5,000
		Energy cons Measures – reduce water consumption	1,000			
	31-7 Weston			31-7 Weston Manor		
		Landscape	2,000		Landscape	5,000
		New roof	5,000		New roof	49,000
		Ventilation	1,000		Ventilation	10,000
		Energy cons Measures – reduce water consumption	5,000		Energy cons Measures – reduce water consumption	5,000
		Energy cons Measures – upgrade common area lighting	2,000		Energy cons Measures – upgrade common area lighting	2,000
		Energy cons Measures – concert heat fm electric to gas	100,000		Energy cons Measures – concert heat fm electric to gas	100,000,
		Energy cons Measures – install cogen system	20,000		Energy cons Measures – concert heat fm electric to gas	20,000
		Energy cons Measures – insulation & weatherstripping	1,000		Energy cons Measures – OMB	1,000
					insulation & weatherstripping	1,000
<b>Total CFP Estimated Cost</b>			313,000			\$330,000

Capital Fund Program Five-Year Action Plan

**Part II: Supporting Pages—Work Activities**

Activities for Year: 4 FFY Grant: 2011 PHA FY: 2011			Activities for Year: 5 FFY Grant: 2012 PHA FY: 2012		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
<b>31-1 Mystic View</b>	<b>Kitchen/bath 4</b>	60,000	<b>31-1 Mystic View</b>	<b>Landscape</b>	50,000
	<b>Exterior receptacles</b>	5,000		<b>Exterior receptacles</b>	5,000
	Landscape	10,000			
	Energy cons Measures – reduce water consumption	20,000		Energy cons Measures – reduce water consumption	20,000
	Energy cons Measures – insulation & weatherstripping	20,000		Energy cons Measures – insulation & weatherstripping	20,000
	Energy cons Measures – upgrade common area lighting	10,000		Energy cons Measures – upgrade common area lighting	10,000
<b>31-2 Highland Gardens</b>	Repair structural problems of balconies w loose concrete	5,000	<b>31-2 Highland Gardens</b>	Repair structural problems of balconies w loose concrete	5,000
	Boiler room	5,000		Boiler room	5,000
	Energy cons Measures – replace boilers & DHW system	10,000		Energy cons Measures – replace boilers & DHW system	10,000
	Energy cons Measures – upgrade common area lighting	5,000		Energy cons Measures – upgrade common area lighting	5,000
<b>31-3 Brady Towers</b>	New Roof	24,000	<b>31-3 Brady Towers</b>	Repair structural problems of balconies w loose concrete	5,000
		5,000			
	Repair structural problems of balconies w loose concrete				
	Energy cons Measures – upgrade common area lighting & apartments	5,000		Energy cons Measures – upgrade common area lighting & apartments	5,000
	Energy cons Measures – insulation & weatherstripping	1,000		Energy cons Measures – insulation & weatherstripping	1,000
<b>31-7 Weston Manor</b>	Landscape	2,000	<b>31-7 Weston Manor</b>	Roof Replacement	50,000
	New roof	10,000		Landscape	11,000
	Ventilation	5,000			
	Energy cons Measures – reduce water consumption	5,000		Energy cons Measures – reduce water consumption	5,000
	Energy cons Measures – upgrade common area lighting	2,000		Energy cons Measures – upgrade common area lighting	2,000
	Energy cons Measures – convert heat fm electric to gas	100,000		Energy cons Measures – concert heat fm electric to gas	100,000
	Energy cons Measures – concert heat fm electric to gas	20,000		Energy cons Measures – concert heat fm electric to gas	20,000

	Energy cons Measures – insulation & weatherstripping	1,000		Energy cons Measures – insulation & weatherstripping	1,000
	Total CFP Estimated Cost	\$330,000			\$330,000

### Capital Fund Program Five-Year Action Plan

Part I: Summary

SAMPLE

PHA Name <i>Anytown Housing Authority</i>		<input 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: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005
	<i>Annual Statement</i>				
<b>10-01/Main Street</b>		\$80,000	\$36,000	\$65,000	\$55,000
<i>10-02/Broadway</i>		\$90,000	\$40,900	\$40,000	\$43,000
<i>HA-wide</i>		\$100,000	\$50,000	\$35,000	\$27,000
CFP Funds Listed for 5-year planning		\$270,000	\$162,900	\$140,000	125,000
Replacement Housing Factor Funds		\$40,000			

Capital Fund Program Five-Year Action Plan

### Part II: Supporting Pages—Work Activities

SAMPLE

Activities for Year 1	Activities for Year : <u>2</u> FFY Grant: 2002 PHA FY: 2002			Activities for Year: <u>3</u> FFY Grant: 2003 PHA FY: 2003		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
<b>See</b>	<b>10-01/Main Street</b>	<b>Porches</b>	\$35,000	10-01/Main Street	<b>Security Doors replaced</b>	\$36,000
		<b>Doors</b>	\$45,000			
	<i>Subtotal</i>		\$80,000			
<b>Annual</b>	<i>10-02/Broadway</i>	<b>Windows</b>	\$55,000	<i>10-02/Broadway</i>	<b>Kitchen Cabinets</b>	\$40,900
		<i>Site Improvements</i>	\$35,000			
	<i>Subtotal</i>		\$90,000			

Statement	HA-wide	Office Equip/Computer System upgrade	\$100,000	HA-Wide	Security/Main Office and Common Hallways	\$50,000
Total CFP Estimated Cost			\$270,000			\$162,900

Capital Fund Program Five-Year Action Plan

**Part II: Supporting Pages—Work Activities**

**SAMPLE (continued)**

Activities for Year : <u>4</u> FFY Grant: 2004 PHA FY: 2004			Activities for Year: <u>5</u> FFY Grant: 2005 PHA FY: 2005		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
<i>10-01/Main Street</i>	<i>Storage sheds and landscaping</i>	\$65,000	<i>10-01/Main Street</i>	<i>Replace bathroom tile</i>	\$55,000
10-02/Broadway	<i>Tub/shower replacement</i>	\$40,000	10-02/Broadway	<i>New gutters and interior doors</i>	\$43,000
<i>HA-wide</i>	<i>Lead-based paint abatement</i>	\$35,000	<i>HA-wide</i>	<i>Office Furniture</i>	\$27,000
Total CFP Estimated Cost		\$140,000			\$125,000



**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.)

<b>Demolition/Disposition Activity Description</b>
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.

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	Highland Garden
1b. Development (project) number:	MA031-2
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:	(07/20/2005)
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:	42
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	Brady Tower
1b. Development (project) number:	MA 031-3
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:	(07/20/2005)
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously-approved Designation Plan?
7. Number of units affected:	84
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	Weston Manor
1b. Development (project) number:	MA031-7
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:	(07/20/2005)
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously-approved Designation Plan?
8. Number of units affected:	80
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

## 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)	
<input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: _____) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> 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.)

<b>Public Housing Homeownership Activity Description</b> <b>(Complete one for each development affected)</b>	
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) <input checked="" type="checkbox"/>	
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)
<i>Computer Learning Center</i>	291	<i>Open to Public</i>	<i>Mystic Activity Center</i>	<i>SHA Identification</i>
Family Self Sufficiency			Administration Building	SHA Section 8 Residents
Mystic Learning Center		<i>Open to Public</i>		
Welcome Project		<i>Open to Public</i>	<i>Mystic Activity Center</i>	
Mystic Learning Center		<i>Open to Public</i>	<i>Mystic Activity Center</i>	
Bunker Hill Comm College		<i>Open to Public</i>	<i>Mystic Activity Center</i>	
Mystic Health Center		<i>Open to Public</i>	Mystic River Apartment Community	Somerville Residents
Infant Toddler Day Care		<i>Open to Public</i>	Mystic River Apartment Community	
Elizabeth Peabody House Day Care		<i>Open to Public</i>	Mystic River Apartment Community	
Children & Youth Activities		<i>Open to Public</i>	Various sites in Somerville	Somerville Residents

**Other Information:**

The Somerville Housing Authority has included as required under PIH 2003-22 in our operating budget eligible costs in our subsidy calculation for the reasonable cost of salary and fringe benefits for an Elderly/Disabled program coordinator. These eligible Elderly/Disabled Service coordinator costs are eligible under 24 CFR 990.108 © as costs attributable to changes in Federal law or regulation. The subsidy amount will be entered on Part A, Line 7 of form HUD-52723, calculation of operating subsidy.

**(2) Family Self Sufficiency program/s**

**a. Participation Description**

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2004 Estimate)	Actual Number of Participants (As of: 10/14/06)
Public Housing	35	23
Section 8	50	50

- 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)

- Mystic View Apartments MA031-0007

**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)
- Develop a follow-up plan to the Resident Survey 2002 which is required under the safety component.

2. Which developments are most affected? (list below)

All Family Developments Mystic View 31-01  
Mystic River & Clarendon (State Program Chapter 200)

**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)

All Family Developments Mystic View 31-01  
Mystic River & Clarendon (State Program Chapter 200)

**D. Additional information as required by PHDEP/PHDEP Plan**

PHAs eligible for FY 2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.  
N//A

- 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 2000 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)]

**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)
- 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, Attachment A & B

Provided below:

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)

- The SHA worked with the RAB(s) in developing the Plan. Some changes were considered and others will be further reviewed during the upcoming year.

**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) The Somerville Housing Authority has a resident commissioner, Mary Griffin, who has been reappointed by the Mayor of local jurisdiction, Somerville, MA. on July 26, 2007 for the remainder of a five-year term.

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) Any adult resident of SHA public housing programs.

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) The Somerville Housing Authority has a resident commissioner, who has been reappointed by the Mayor of local jurisdiction, Somerville, MA. to a five-year term.

**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: (City of Somerville, Massachusetts)

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)

The SHA shall make efforts towards communicating public housing needs to the local jurisdiction's Office of Housing and Community Development (OHCD) to include in upcoming Consolidated Plan.

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



**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.

MA031 a03	Resident Advisory Board Comments
MA031 b03	Resident Advisory Board Comments
MA031 c03	Response to RAB From SHA
MA031 d03	Pet Policy
MA031 e03	Rent Limit Policy
MA031 f03	List of resident organization creating RAB
MA031 g03	Admissions Policy for Deconcentration
MA031 h03	Schedule of Project based Units
MA031 i03	Violence Against Women Policy
MA031 j03	Resident Membership on the Governing Board
MA031 k03	Deficiency Response letter
MA031 L03	Community Service Requirements

**Attachment MA031a03**

Susan Hegel and Ellen Shachter  
Cambridge and Somerville Legal Services  
60 Gore Street, Suite 203  
Cambridge, MA 02141

Paul,

As per your earlier request, here is a proposed agenda for tomorrow's RAB meeting at 12:00 noon at the Adm Building. We realize we have not given you much notice of the issues, so this is really just meant to start a dialogue which can then continue outside the RAB process and timelimits -- hope this is OK.

**Disability Issues**

1. Does SHA have a Section 504/ADA coordinator or other SHA staff person designated to receive and/or handle disabilityrelated requests from tenants and applicants, including requests for physical modifications or other reasonable accommodations?
  - a. if there is such a person, how is this person's contact information disseminated to tenants and applicants?
  - b. is this information relayed to new tenants as part of their orientation meeting with their manager?
2. Does SHA have a reasonable accommodation policy (e.g. one document which sets forth the procedure and timelines for requesting and acting upon a request for reasonable accommodation and notice of grievance rights to appeal an adverse decision). We recognize that there are references to, and examples of, the SHA's obligation to reasonably accommodate in its section 8 adm plan and ACOP, but we don't know if there is a separate document laying out the process.
  - a. if there is such a policy, how is it disseminated to tenants and applicants?
  - b. how is confidentiality of medical information ensured
3. [What outreach is done by the SHA to ensure that persons with disabilities apply for and participate in its programs?](#)

**Rent Reductions**

1. despite last year's advocacy and change in wage verification form, tenants are being told to submit 10 consecutive pay stubs before rent is adjusted.
  - a. could you bring copies of the wage verification forms currently used in SHA's programs (state, federal, section 8) for when there are interim changes in wages?

**Section 8**

1. mutual termination form
2. loose ends - need to draft Section 8 Adm Plan chapters re: SRO mod rehab and Mainstream and DHAP. These are "reserved." Chapter 23 (FSS), Chapter 24 (PBC) and Appendix A (MOU for S + C) are missing from the last Adm Plan provided to us, but we think they exist & need to be added. (FSS is from 1999, so may need to be updated to reflect current policies).
3. payment standards - does SHA plan to change them soon?  
lease up rates - are tenants able to find apartments (particularly 3 or more bedroom units) in Somv within search time allotted?

**Language Assistance Plan** - At the meeting, could you give us a copy of the card that tenants complete and the checklist (of what docs have been translated into what languages)?

Thanks.

Susan Hegel and Ellen Shachter  
Cambridge and Somerville Legal Services  
60 Gore Street, Suite 203  
Cambridge, MA 02141  
tel: (617) 603-2700, ext. 2712 and 2731  
fax: (617) 494-8222

**Attachment MA031b03**

RAB Meeting Tenant Issues – September 6, 2007

1. Finish LEP Policy
2. Finish VAWA Policy
3. Get updates from SHA

- a. Number of tenant subject to community service and their placements)
- b. Number of tenants receiving the optional deductions from income (for rent)

Education

Age

- c. Number of tenants at (and close to) flat rent (max rent)
- d. Update on Section 3 Policy

Any anticipated projects subject to Section 3

If so, job types and approximate costs

- 4. Get budget information from SHA (including for resident services)
- 5. Talk about ways the SHA can foster the Mystic Tenant Association
- 6. Other issues identified by Tenants (at upcoming general membership meeting)
- 7. Section 8

**Attachment MA031 c03 REPONSE TO RAB COMMENTS**



**SOMERVILLE HOUSING AUTHORITY**

30 Memorial Road  
Somerville, Massachusetts 02145  
Telephone (617) 625-1152 Fax (617) 628-7057 TDD (617) 628-8889

To: Resident Advisory Board (RAB) Members

Re: Two (2) Responses to Residence Advisory Board Topics dated October 18, 2007  
And September 6, 2007

October 18, 2007 RESPONSE

**Disability Issues:**

1. Section 504/ADA Coordinator: Currently, SHA does not have an individual employee coordinating these issues. All requests from residents are channeled directly through property managers and/or resident Service Coordinators. Requests/issues are addressed on site at the management level unless the resolution requires extraordinary materials and labor outside of normal maintenance functions. In those cases, the issue is directed to the Director of Operations and/or Deputy Director.

- a. Managers and Resident Service staff are responsible to disseminate information to new and current residents about their rights and remedies.
- b. SHA residents, both new and current actively gather through multiple on-site events and discuss concerns, problems and issues with staff on a regular basis.

*SHA will endeavor to hire an additional Resident Service coordinator with an emphasis on these important issues.*

2. Reasonable Accommodation Policy: SHA is committed to researching and implementing a policy during 2008. SHA has gathered numerous policies from area HA's and will work with our RAB members to craft an effective policy.

3. Outreach: Somerville and the surrounding communities have multiple agencies assisting persons w/disabilities. SHA has and will continue to work with those agencies to maximize housing opportunities.

**Rent Reductions**

1. SHA has corrected it procedure and communicated with all managers.

Section 8

Language Assistance Plan: SHA has successfully implemented our LAP, trained all staff members and will continue to translate documents, identify effectiveness of plan, revise phone communications and assess our progress throughout 2008.

September 6, 2007 RESPONSE

1. Finish LEP Policy: SHA has completed and implemented our Language Assistance Plan (detailed above)

2. Finish VAWA Policy: SHA has completed and implemented.

3 Updates:

- a. Community Service: SHA will commit to improving and communicating opportunities for persons subject to community service.
- b. & c. Discussed to the satisfaction of all and SHA has sent policy regarding income exclusion for persons 21 years of age and under who have obtained a high school diploma or GED.
- d. Section 3 Policy: The projects underway are all State funded and therefore not subject to this requirement however, SHA has a long successful track record on hiring residents for

available positions. SHA will continue to request opportunities and require where allowed.

4. Budget: Budget information was provided and questions answered.

5. MTA Relations: SHA has met w/the MTA and agreed to a new format for family meetings and improved communication.

FSS issues were discussed to the satisfaction of all.

**ADDITIONAL SECTION 8 RESPONSE**

**From:** Linda DeProffo

**Sent:** Friday, January 04, 2008 11:40 AM

**To:** RAB and Paul Mackey

**Subject:** RE: RAB Comments

- 1. Mutual Termination has been changed
- 2. FSS Action Plan was revised 5/1/05 and attached to Admin Plan; PB attached; S + C attached
- 3. PS increased to 107% as of 11/1/07 and will remain the same
- 4. Over the past 10 months SHA issued 48 vouchers – 37 leased within the allotted time - 16 of those leased in Somerville. Most vouchers were issued to out of town people (end of closed waiting list). However this month we will issue 29 vouchers. All will live or work in Somerville and we will have a better picture of the Somerville market

Linda  
*Linda DeProffo*  
*Director of Rental Assistance*  
*Somerville Housing Authority*

**From:**Paul Mackey

**Sent:** Friday, January 04, 2008 10:40 AM

**To:** Linda DeProffo

**Subject:** RAB Comments

**Section 8**

1. mutual termination form

2. loose ends - need to draft Section 8 Adm Plan chapters re: SRO mod rehab and Mainstream and DHAP. These are "reserved." Chapter 23 (FSS), Chapter 24 (PBC) and Appendix A (MOU for S + C) are missing from the last Adm Plan provided to us, but we think they exist & need to be added. (FSS is from 1999, so may need to be updated to reflect current policies).

3. payment standards - does SHA plan to change them soon?

lease up rates - are tenants able to find apartments (particularly 3 or more bedroom units) in Somv within search time allotted

**Attachment MA031d03 Pet Policy**

Somerville Housing Authority  
Attachment MA031d:Pet Policy

**SOMERVILLE HOUSING AUTHORITY  
PET POLICY AND PROCEDURES**

The purpose of the Pet Policy (hereinafter "policy") is to establish rules and guidelines regulating the keeping of "common household pets" in the Somerville Housing Authority (SHA). Management must approve of any pet except for caged birds and fish. A service animal which is specially trained to assist an individual with a disability in specific activities of daily living (for example, a dog guiding individuals with impaired vision or alerting individuals with impaired hearing) is not considered a pet for which permission to keep is required. When it is kept in a safe and sanitary manner by an individual with a disability to whom the animal gives necessary assistance in activities of daily living, a service animal shall be considered a pet in computing the number of pets kept.

For this policy an example of a "common household pet" includes domesticated animals such as dogs, cats, birds, hamster, gerbil, fish, or turtles. A monkey or snake is an example of an animal that is not a "common household pet" (hereinafter "pet").

This policy provides that the SHA will not prohibit an elderly or disabled resident from owning and/or keeping a common household pet in their dwelling unit.

This policy is deemed to be an addendum to the residents lease.

**A. Ownership of Pets**

Because of the vast number of young children residing in the family developments, and the threat to personal safety and sanitary conditions, dogs will not be permitted in the Mystic or Clarendon developments. Senior buildings will retain their right to keep a small dog in accordance with the provisions of this policy.

1. Each pet kept in a dwelling unit must be licensed and immunized to the extent required by state or local law. The pet must be restrained while in any common area of the development.
2. Cats or dogs that are kept in dwelling units must be spayed or neutered and certified clean by a veterinarian.

**B. Number and Size of Pets**

1. A resident may only have one (1) pet at a time. However, any resident that owned more than one cat prior to December 15,1998 will be permitted to keep a maximum of two (2) cats. Cats are the only pets that will be recognized as preexisting under this provision.
2. No pet may exceed 30 pounds in weight. **Animals used to assist the disabled are excluded from this size limitation.**
3. Any pet other than a cat or dog must be kept in a cage when in a dwelling unit. No rodents are allowed unless kept in a cage. Fish and turtle tanks are limited to 20 gallons.

**C. Financial Obligation of Pet Care**

1. Each pet owner must provide adequate daily care to maintain the pet in good health including immunization.
2. Damage to any property within the dwelling unit or common areas that is the direct result of a pet's behavior is the financial responsibility of the pet owner.
3. If an owner is incapacitated to the extent that they cannot provide daily care for the pet, the owner will arrange to provide for the pet's care, either on a temporary or permanent basis, depending on the individual circumstances.

**D. Pet Registration**

1. All pet's must be registered (form SHA-PF) annually with the SHA property manager. Registration must include the following:
  - a. for cats and dogs, veterinary certificate of inoculation;
  - b. for cats and dogs, license information about the pet;
  - c. The name of the person who will care for the pet if the owner dies or becomes incapacitated.

The designated pet caretaker and the pet owner must sign the lease addendum for pets (Form ) indicating that they have read the Pet Policy and agree to comply with it.

2. SHA may refuse to register a pet if SHA reasonably determines that the pet owner, because of practices, habits, or physical condition, is unable to keep the pet according to the rules, or if the pet temperament is such that the rules will not be followed. SHA will notify the pet owner in writing within ten (10) business days if registration of pet is refused. The notice will state the basis for the refusal.

3. A resident keeping an unregistered pet is violating Policy rules and will be treated according to the rules in section J of this Policy.

#### **E. Pet Deposit**

A pet deposit must be paid upon registration of any cat or dog registered after the implementation date of this policy (March 1, 1999). The pet deposit is \$ 50.00 A pet owner unable to pay this deposit in full may request a payment agreement. A down payment of \$10.00 will be required for the payment agreement. The pet deposit is refundable when the dwelling unit is vacated or upon removal of the pet if an inspection of the premises reveals no evidence of pet-related damage. Pet damage includes, but is not limited to, grounds cleanup, carpet cleaning and/or replacement if stained, carpet deodorizing, and scratching or clawing damage to any surfaces.

#### **F. Pet Restraints**

1. Pets must be restrained at all times when not in the dwelling unit.
2. A pet may not roam loose. Each pet **must be attended** when outside the dwelling unit.
3. Tethering of unattended pets is not allowed.
4. Pets are not allowed in any common areas unless entering or exiting the dwelling unit.

#### **G. Disposal of Pet Wastes**

1. Each pet owner is responsible for the immediate removal of all pet waste in a sanitary manner. Disposal must be in waterproof containers to avoid leakage and odor and must be in the manner prescribed by the SHA for each development.
2. Pet owners who fail to remove pet waste will be charged a cleanup fee of \$5.00 per occurrence. Repeated failures to remove pet waste and/or pay cleanup fees are grounds for eviction.

#### **H. Pet Behavior**

1. Each pet owner is responsible for the behavior of his/her pet and must control behavior such as noisiness to ensure the peaceful enjoyment of the premises.
2. If there are pet-related disturbances or damages, a notice of lease violation will be issued to the pet owner by the management staff. If the pet owner fails to correct the condition or permits its reoccurrence after notification, SHA may terminate the resident's lease for good cause.
3. In an emergency, when it is necessary for the protection of the pet, other residents, resident's guests, or SHA staff, SHA may immediately remove the pet.
4. Dogs may not be left unattended inside a dwelling unit for more than ten (10) hours. All other pets may not be left unattended for more than 24 hours.
5. In the event of an animal bite or attack on another tenant or pet, the pet owner is solely responsible for any costs arising from the incident.
6. All pets must be housebroken.

#### **I. Visiting Pets**

The SHA will not allow visiting pets in any dwelling unit for any period of time unless expressly approved in advance by the management staff.

#### **J. Pet Rule Violation Procedures**

If the SHA determines that an owner has violated a provision of the Policy, a lease violation will be issued. Failure to correct any identified problems within (10) days, or a repetition of a similar violation occurring within six (6) months, will constitute grounds for eviction. Failure to correct violations of the policy or pay for pet damages will result in removal of the pet and/or termination of the resident's lease.

#### **K. Pet Grievance Panel**

A pet grievance committee will be established for the purposes of resolving disputes arising from the SHA pet policy. The pet grievance panel will be comprised of one SHA designee, one resident representative, and a third member agreed upon by these two members. The panel will render written decision based upon majority opinion, based upon material facts, applicable law and regulations.

In cases where appeals are sought, the SHA will directly furnish a list to the tenant concerning information and process necessary to pursue an appeal.

**Attachment MA031 e03 Rent Limit Policy**

SOMERVILLE HOUSING AUTHORITY  
ANNUAL PLAN  
RENT LIMIT POLICY: ATTACHMENT MA031E

## RENT LIMIT POLICY

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### PREFACE

The Somerville Housing Authority has established standards of rent for its federal housing residents for the period of April 1, 2008 – March 31, 2009 under the Housing reform Act of 1998, Final Rule October 21, 1999.

Subtitle A of the QHWRA Minimum Rent Section 507

In response to HUD 50075, Annual Plan template, expires 03/31/2009, the Authority shall continue its policy of \$0 for a minimum rent and maintain the ceiling rent at 80% of the most current Fair Market Rent for the area, as established by HUD.

**Attachment Ma031 f03 RAB**

**OTHER Attendees and LOCAL AGENCIES**

Melissa McWhinney; CAAS  
Eileen Feldman; Disabilities Commission  
Susan Mortimer Somerville Mental Health

**RESIDENT ADVISORY BOARD MEMBERSHIP**

Warren Goldstein-Gelb  
**The Welcome Project**  
530 Mystic Avenue  
Somerville, MA 02145

Abdullah Magan, Pierre Jean-Louis  
Marie Younte, Severe Holophe  
**Mystic Tenant**  
Association  
530 Mystic Avenue  
Somerville, MA 02145

Susan Hegel, and Ellen Shachter  
**Cambridge and Somerville Legal Services**  
(CASLS)  
60 Gore Street  
Cambridge, MA 02141

**TENANT ASSOCIATIONS – SENIOR BUILDINGS**

**TRUSTEES, BRADY TOWERS**

**Housing Manager – Cathy Federico, 617- 666-2117**

Tom White, Apt. 101 (617-412-6226)  
Elizabeth Marie Gillis, Apt. 203 (617-666-0094)  
252 Medford Street  
Somerville, MA 02143

**BRYANT MANOR**

**Housing Manager – Cathy Federico, 617- 666-2117**

Floyd Richardson, Apt. 527 (617-718-2462)  
75 Myrtle Street  
Somerville, MA 02145

**TRUSTEES, CAPEN COURT**

**Housing Manager – Roseweld Cornet, 617-666-0425**

Rita McCarthy, Apt. 6C (617-627-9704)  
Capen Court  
Somerville, MA 02144

**TRUSTEES, CIAMPA MANOR**

**Housing Manager – Roseweld Cornet, 617-666-0425**

Harriett Terlage, Apt. 405 (617-623-2113)  
27 College Avenue  
Somerville, MA 02144

**TRUSTEES, HIGHLAND GARDENS**

**Housing Manager – Cathy Federico**

Maureen Spear, Apt. 502 (617-623-6726)  
Tom Ebrecht, Apt.204 (617-623-1181)  
114 Highland Avenue  
Somerville, MA 02143

**JAMES J. CORBETT APTS.**

**Housing Manager – Bernice Dizon, 625-1152**

Ethel Ross, Apt. 103 (617-629-2446)  
32 Jaques Street  
Somerville, MA 02145

**JAMES J. CORBETT APTS.**

**Housing Manager – Bernice Dizon**

Leslie Muise, Apt. 104 (617-625-0982)  
125 Jaques Street  
Somerville, MA 02145

**PROPERZI MANOR**

**Housing Manager – Annmarie Whitnev- 625-1152**

Betty Mederios, Apt. 501(617-628-3631)  
13-25 Warren Avenue  
Somerville, MA 02143

**TRUSTEES, WESTON MANOR**

**Housing Manager – Cathy Federico**

Kathleen Allosso, Apt. 510 (617-629-0072)  
15 Weston Avenue, Apt. 510  
Somerville, MA 02144

**HAGAN MANOR**

**Housing Manager – Cathy Federico**

NO TENANT ASSOCIATION

268 Washington Street

Somerville, MA 02143

**TENANT ASSOCIATIONS – FAMILY DEVELOPMENTS**

**CLARENDON HILL**

**Housing Manager – Roseweld Cornet**

Wendy Minzer (617-666-0869)  
278 PHB, Apt. 17C

Josepha Dorleans (617-666-6099)

**MYSTIC VIEW ASSOC. (Off. # 617-625-2348)**

**Housing Manager – Annmarie Whitnev (Federal)  
and Bernice Dizon (State)**

Pierre Jean Louis (617-776-9574)

60 River Road

- 67 -  
Betty Adams  
5 River Road, Apt. 505 (617-623-7241)  
Somerville, MA 02145

## **Somerville Housing Authority Admissions Policy for Deconcentration**

The Somerville Housing Authority (SHA) has adopted a policy for non-implementation of Deconcentration. The SHA has only one (1) Federal Family development, Mystic View Apartments MA031-1 therefore, is not required to comply with Section 513.

*BOARD RESOLUTION  
NOVEMBER 10, 1999*

In accordance with the 1998 Housing Reform Act/ the Quality Housing and Work Responsibility Act of 1998 (QHWRA), the Somerville Housing Authority acknowledges Section 513 of this Act.

Section 513 imposes provisions for deconcentration and income mixing, by bringing higher income tenants into lower income public housing developments and bringing lower income residents into higher income public housing developments with in all Federal family housing developments.

The Somerville Housing Authority has only one Federal family development and will automatically meet this requirement.

Therefore, the Somerville Housing Authority does not need to make revisions to its Admission and Continued Occupancy Policy (ACOP) since it is already in compliance, and;

Therefore, the Somerville Housing Authority is in compliance with the HUD requirement for public housing authorities to immediately develop this policy within 120 days of October 21, 1999, the Final Rule date of the Quality Housing and Work Responsibility Act.



<b>Attachment MA031 h03 PB Units</b>					
<b>YMCA ACC: 702</b>					<b>ALLOTTED UNITS: 12</b>
<b>TENANT NUMBER</b>	<b>ADDRESS</b>	<b>CITY</b>	<b>START LEASE</b>		<b>BEDROOM SIZE</b>
0509-01	101 HIGHLAND AVENUE	SOMERVILLE	1/15/2002		0
0937-01	101 HIGHLAND AVENUE	SOMERVILLE	5/1/2002		0
0938-01	101 HIGHLAND AVENUE	SOMERVILLE	5/1/2002		0
0021-44	101 HIGHLAND AVENUE	SOMERVILLE	8/1/2003		0
0030-04	101 HIGHLAND AVENUE	SOMERVILLE	8/1/2003		0
0038-06	101 HIGHLAND AVENUE	SOMERVILLE	8/1/2003		0
1534-04	101 HIGHLAND AVENUE	SOMERVILLE	9/1/2004		0
0136-10	101 HIGHLAND AVENUE	SOMERVILLE	11/1/2002		0
0583-03	101 HIGHLAND AVENUE	SOMERVILLE	8/1/2003		0
2010-70	101 HIGHLAND AVENUE	SOMERVILLE	8/1/2003		0
0942-04	101 HIGHLAND AVENUE	SOMERVILLE	2/1/2004		0
0563-04	101 HIGHLAND AVENUE	SOMERVILLE	11/1/2001		0
<b>TOTALS:</b>		<b>UNITS LEASED</b>		<b>0 BEDROOM</b>	
101 HIGHLAND AVENUE					
<b>GRAND TOTAL LEASED</b>		<b>12</b>		12	
<b>EXPIRES: 11/21/2006</b>					
<b>NORTH CHARLES ACC. 703</b>					
<b>YMCA ACC: 702</b>					<b>ALLOTTED UNITS: 8</b>
<b>TENANT NUMBER</b>	<b>ADDRESS</b>	<b>CITY</b>	<b>START LEASE</b>		<b>BEDROOM SIZE</b>
0511-01	769 BROADWAY STREET	SOMERVILLE	1/15/2002		0
3758-03	769 BROADWAY STREET	SOMERVILLE	1/1/2004		0
0703-01	769 BROADWAY STREET	SOMERVILLE	1/15/2002		0
3815-03	769 BROADWAY STREET	SOMERVILLE	04/1/047		0
0705-01	769 BROADWAY STREET	SOMERVILLE	1/15/2002		0
1036-01	769 BROADWAY STREET	SOMERVILLE	1/15/2002		0
5233-03	769 BROADWAY STREET	SOMERVILLE	10/15/2004		0
3179-03	769 BROADWAY STREET	SOMERVILLE	10/15/2004		0
<b>TOTALS:</b>		<b>UNITS LEASED</b>		<b>0 BEDROOM</b>	
769 BROADWAY STREET		8		8	
<b>GRAND TOTAL LEASED</b>		<b>8</b>			
<b>MIRRIAM STREET ACC.704</b>					
<b>YMCA ACC: 702</b>					<b>ALLOTTED UNITS: 8</b>
<b>TENANT NUMBER</b>	<b>ADDRESS</b>	<b>CITY</b>	<b>START LEASE</b>		<b>BEDROOM SIZE</b>
0151-02	57 MERRIAM STREET	SOMERVILLE	6/1/2002		0
0153-02	57 MERRIAM STREET	SOMERVILLE	6/1/2002		0
0172-02	57 MERRIAM STREET	SOMERVILLE	6/1/2002		0
0177-02	57 MERRIAM STREET	SOMERVILLE	6/1/2002		0
0948-02	57 MERRIAM STREET	SOMERVILLE	6/1/2002		0

0764-03	57 MERRIAM STREET	SOMERVILLE	10/15/2004		0	
1731-04	57 MERRIAM STREET	SOMERVILLE	10/15/2004		0	
4349-04	57 MERRIAM STREET	SOMERVILLE	6/15/2004		0	
<b>TOTALS:</b>	<b>UNITS LEASED</b>	<b>0 BEDROOM</b>				
57 MERRIAM ST.	8	8				

**GRAND TOTAL LEASED:**

**8**

*EXPIRES: 12/15/2006*

<b>LINDEN STREET</b>	<b>ACC. 705</b>				<b>ALLOTTED UNITS:</b>	
					<b>18</b>	
<b>TENANT NUMBER</b>	<b>ADDRESS</b>	<b>CITY</b>	<b>START LEASE</b>		<b>BEDROOM SIZE</b>	
9753-02	20 CHARLESTOWN STREET	SOMERVILLE	1/1/2003		2	
0594-03	10 CHARLESTOWN STREET	SOMERVILLE	2/1/2003		2	
0547-03	10 CHARLESTOWN STREET	SOMERVILLE	1/15/2003		2	
0546-04	34 LINDEN STREET	SOMERVILLE	1/15/2003		3	
0001-72	36 LINDEN STREET	SOMERVILLE	1/15/2003		3	
0030-02	32 MERRIAM STREET	SOMERVILLE	2/1/2003		3	
0030-58	30 LINDEN STREET	SOMERVILLE	1/1/2003		3	
0076-02	36 LINDEN STREET	SOMERVILLE	2/15/2003		3	
0115-02	20 MERRIAM STREET	SOMERVILLE	12/1/2002		2	
0289-03	26 MERRIAM STREET	SOMERVILLE	12/15/2002		2	
0300-03	26 MERRIAM STREET	SOMERVILLE	12/15/2002		2	
0312-04	20 MERRIAM STREET	SOMERVILLE	12/15/2002		2	
0316-10	24 CHARLESTOWN STREET	SOMERVILLE	12/15/2002		2	
0366-04	24 CHARLESTOWN STREET	SOMERVILLE	12/15/2002		2	
0407-03	26 MERRIAM STREET	SOMERVILLE	12/15/2002		2	
0439-03	20 CHARLESTOWN STREET	SOMERVILLE	1/1/2003		2	
0460-03	34 LINDEN STREET	SOMERVILLE	1/15/2003		3	
0480-03	30 LINDEN STREET	SOMERVILLE	1/1/2003		3	
<b>TOTALS</b>	<b>UNITS LEASED</b>	<b>2-BR</b>	<b>3-BR</b>			
<i>CHARLESTOWN STREET</i>	<b>6</b>	<b>6</b>	<b>0</b>			
<i>LINDEN STREET</i>	<b>6</b>	<b>0</b>	<b>6</b>			
<i>MERRIAM STREET</i>	<b>6</b>	<b>5</b>	<b>1</b>			
	<b>TOTAL LEASED: 18</b>					
<b>TOTAL PROJECT BASED UNITS LEASED:</b>		<b>76</b>				

**Attachment MA031 i03**

**SOMERVILLE HOUSING AUTHORITY  
VIOLENCE AGAINST WOMEN ACT POLICY**

**I. Purpose and Applicability**

The purpose of this policy (herein called "Policy") is to implement the applicable provisions of the Violence Against Women and Department of Justice Reauthorization Act of 2005 (Pub. L. 109-162) (VAWA) and more generally to set forth Somerville Housing Authority's (SHA) policies and procedures regarding domestic violence, dating violence, and stalking, as hereinafter defined.

*This Policy shall be applicable to the administration by SHA of all federally subsidized public housing and Section 8 rental assistance under the United States Housing Act of 1937 (42 U.S.C. §1437 et seq.). Notwithstanding its title, this policy is gender-neutral, and its protections are available to males who are victims of domestic violence, dating violence, or stalking as well as female victims of such violence.*

**II. Goals and Objectives**

*This Policy has the following principal goals and objectives:*

- A. Maintaining compliance with all applicable legal requirements imposed by VAWA;
- B. Ensuring the physical safety of victims of actual or threatened domestic violence, dating violence, or stalking who are assisted by SHA;
- C. Providing and maintaining housing opportunities for victims of domestic violence dating violence, or stalking;
- D. Creating and maintaining collaborative arrangements between SHA, law enforcement authorities, victim service providers, and others to promote the safety and well-being of victims of actual and threatened domestic violence, dating violence and stalking, who are assisted by SHA; and
- E. Taking appropriate action in response to an incident or incidents of domestic violence, dating violence, or stalking, affecting individuals assisted by SHA.

**III. Other SHA Policies and Procedures**

*This Policy shall be referenced in and attached to SHA's Five-Year Public Housing Agency Plan and shall be incorporated in and made a part of SHA's Admissions and Continued Occupancy Policy and SHA's Section 8 Administrative Plan. SHA's annual public housing agency plan shall also contain information concerning SHA's activities, services or programs relating to domestic violence, dating violence, and stalking.*

*To the extent any provision of this policy shall vary or contradict any previously adopted policy or procedure of SHA, the provisions of this Policy shall prevail.*

**IV. Definitions**

*As used in this Policy:*

A. **Domestic Violence** – The term 'domestic violence' includes felony or misdemeanor crimes of violence committed by a current or former spouse of the victim, by a person with whom the victim shares a child in common, by a person who is cohabiting with or has cohabited with the victim as a spouse, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction."

B. **Dating Violence** – means violence committed by a person—

- (A) who is or has been in a social relationship of a romantic or intimate nature with the victim; and
- (B) where the existence of such a relationship shall be determined based on a consideration of the following factors:

- (i) The length of the relationship.
- (ii) The type of relationship.
- (iii) The frequency of interaction between the persons involved in the relationship.

C. **Stalking – means –**

(A) (i) to follow, pursue, or repeatedly commit acts with the intent to kill, injure, harass, or intimidate another person; and (ii) to place under surveillance with the intent to kill, injure, harass or intimidate another person; and

(B) in the course of, or as a result of, such following, pursuit, surveillance or repeatedly committed acts, to place a person in reasonable fear of the death of, or serious bodily injury to, or to cause substantial emotional harm to –

- (i) that person;
- (ii) a member of the immediate family of that person; or
- (iii) the spouse or intimate partner of that person;

D. **Immediate Family Member** - means, with respect to a person –

- (A) a spouse, parent, brother, sister, or child of that person, or an individual to whom that person stands in loco parentis; or
- (B) any other person living in the household of that person and related to that person by blood or marriage.

E. *Perpetrator* – means person who commits an act of domestic violence, dating violence or stalking against a victim.

## V. Admissions and Screening

*Non-Denial of Assistance.* SHA will not deny admission to public housing or to the Section 8 rental assistance program to any person because that person is or has been a victim of domestic violence, dating violence, or stalking, provided that such person is otherwise qualified for such admission. Where the SHA receives adverse information about an applicant/household member and is aware that domestic violence might be involved, the SHA shall determine whether there is a substantial connection between the adverse information and the fact that the applicant/household member is a victim of domestic violence. If the SHA determines that there is such a connection, then the SHA shall disregard the adverse information (provided that the perpetrator will not be part of the applicant's household).

A substantial connection includes, but is not limited to, where a victim loses financial support (e.g. victim's job or perpetrator's wages) due to domestic violence and is evicted (or receives a negative landlord reference) for late or nonpayment of rent; where a victim is evicted or receives a negative landlord reference due to property damage and/or noise or other interference with neighbors caused by the perpetrator; and where a victim receives a negative landlord reference for breaking a lease prior to its expiration due to domestic violence.

## VI. Termination of Tenancy or Assistance

A. *VAWA Protections.* Under VAWA, public housing residents and persons assisted under the Section 8 rental assistance program have the following specific protections, which will be observed by SHA:

1. An incident or incidents of actual or threatened domestic violence, dating violence, or stalking will not be considered to be a "serious or repeated" violation of the lease by the victim or threatened victim of that violence and will not be good cause for terminating the tenancy or occupancy rights of or assistance to the victim of that violence.

2. In addition to the foregoing, tenancy or assistance will not be terminated by SHA as a result of criminal activity, if that criminal activity is directly related to domestic violence, dating violence or stalking engaged in by a member of the assisted household, a guest or another person under the tenant's control, and the tenant or an immediate family member is the victim or threatened victim of this criminal activity. However, the protection against termination of tenancy or assistance described in this paragraph is subject to the following limitations:

(a) Nothing contained in this paragraph shall limit any otherwise available authority of SHA' or a Section 8 owner or manager to terminate tenancy, evict, or to terminate assistance, as the case may be, for any violation of a lease or program requirement not premised on the act or acts of domestic violence, dating violence, or stalking in question against the tenant or a member of the tenant's household. However, in taking any such action, neither SHA nor a Section 8 manager or owner may apply a more demanding standard to the victim of domestic violence dating violence or stalking than that applied to other tenants.

(b) Nothing contained in this paragraph shall be construed to limit the authority of SHA or a Section 8 owner or manager to evict or terminate from assistance any tenant or lawful applicant if the owner, manager or SHA, as the case may be, can demonstrate an actual and imminent threat to other tenants or to those employed at or providing service to the property, if the tenant is not evicted or terminated from assistance.

3. Where property damage is caused by a perpetrator, the SHA shall not terminate the Section 8 subsidy or evict from public housing the victim of domestic violence, dating violence, or stalking because of such property damage.

4. Where nonpayment of rent or other charges due the SHA is caused by the perpetrator, and where the victim of domestic violence, dating violence or stalking removes said perpetrator from the lease, the SHA shall offer the remaining household members a reasonable repayment plan (without charging late fees but may recover costs) and shall not evict the remaining members for such nonpayment so long as they substantially comply with said plan.

B. *Removal of Perpetrator.* Further, notwithstanding anything in paragraph VI.A.2. or Federal, State or local law to the contrary, SHA or a Section 8 owner or manager, as the case may be, may bifurcate a lease, or remove a household member from a lease, without regard to whether a household member is a signatory to a lease, in order to evict, remove, terminate occupancy rights, or terminate assistance to any individual who is a tenant or lawful occupant and who engages in acts of physical violence against family members or others. Such action against the perpetrator of such physical violence may be taken without evicting, removing, terminating assistance to, or otherwise penalizing the victim of such violence who is also the tenant or a lawful occupant. Such eviction, removal, termination of occupancy rights, or termination of assistance shall be effected in accordance with the procedures prescribed by law applicable to terminations of tenancy and evictions by SHA.

## VII. Verification of Domestic Violence, Dating Violence or Stalking

A. *Requirement for Verification.* The law allows, but does not require, SHA or a section 8 owner or manager to verify that an incident or incidents of actual or threatened domestic violence, dating violence, or stalking claimed by a tenant or other lawful occupant is bona fide and meets the requirements of the applicable definitions set forth in this policy. Subject only to waiver as provided in paragraph VII. C., SHA shall require verification in all cases where an individual claims protection against an action involving such individual proposed to be taken by SHA. Section 8 owners or managers receiving rental assistance administered by SHA may elect to require verification, or not to require it as permitted under applicable law.

Verification of a claimed incident or incidents of actual or threatened domestic violence, dating violence or stalking may be accomplished in one of the following three ways:

1. *HUD-approved form* - by providing to SHA or to the requesting Section 8 owner or manager a written certification, on a form approved by the U.S. Department of Housing and Urban Development (HUD), that the individual is a victim of domestic violence, dating violence or stalking that the incident or incidents in question are bona fide incidents of actual or threatened abuse meeting the requirements of the applicable definition(s) set forth

in this policy. The incident or incidents in question must be described in reasonable detail as required in the HUD-approved form, and the completed certification must include the name of the perpetrator.

2. *Other documentation* - by providing to SHA or to the requesting Section 8 owner or manager documentation signed by an employee, agent, or volunteer of a victim service provider, an attorney, or a medical professional, from whom the victim has sought assistance in addressing the domestic violence, dating violence or stalking, or the effects of the abuse, described in such documentation. The professional providing the documentation must sign and attest under penalty of perjury (28 U.S.C. 1746) to the professional's belief that the incident or incidents in question are bona fide incidents of abuse meeting the requirements of the applicable definition(s) set forth in this policy. The victim of the incident or incidents of domestic violence, dating violence or stalking described in the documentation must also sign and attest to the documentation under penalty of perjury.

3. *Police or court record* – by providing to SHA or to the requesting Section 8 owner or manager a Federal, State, tribal, territorial, or local police or court record describing the incident or incidents in question.

B. *Time allowed to provide verification/ failure to provide.* An individual who claims protection against adverse action based on an incident or incidents of actual or threatened domestic violence, dating violence or stalking, and who is requested by SHA, or a Section 8 owner or manager to provide verification, must provide such verification within 14 business days (*i.e.*, 14 calendar days, excluding Saturdays, Sundays, and federally-recognized holidays) after receipt of the request for verification. Failure to provide verification, in proper form within such time will result in loss of protection under VAWA and this policy against a proposed adverse action. Extensions may be granted for good cause.

C. *Waiver of verification requirement.* The Executive Director of SHA, or a Section 8 owner or manager, may, with respect to any specific case, waive the above-stated requirements for verification and provide the benefits of this policy based on the victim's statement or other corroborating evidence. Such waiver may be granted in the sole discretion of the Executive Director, owner or manager. Any such waiver must be in writing. Waiver in a particular instance or instances shall not operate as precedent for, or create any right to, waiver in any other case or cases, regardless of similarity in circumstances.

### VIII. Confidentiality

A. *Right of confidentiality.* All information (including the fact that an individual is a victim of domestic violence, dating violence or stalking) provided to SHA or to a Section 8 owner or manager in connection with a verification required under section VII of this policy or provided in lieu of such verification where a waiver of verification is granted, shall be retained by the receiving party in confidence and shall neither be entered in any shared database nor provided to any related entity, except where disclosure is:

1. requested or consented to by the individual in writing, or
2. required for use in a public housing eviction proceeding or in connection with termination of Section 8 assistance, as permitted in VAWA, or
3. otherwise required by applicable law.

B. *Notification of rights.* All tenants of public housing and tenants participating in the Section 8 rental assistance program administered by SHA shall be notified in writing concerning their right to confidentiality and the limits on such rights to confidentiality.

### IX. Transfer to New Residence

A. *Application for transfer.* In situations that involve significant risk of violent harm to an individual as a result of previous incidents or threats of domestic violence, dating violence, or stalking, SHA will, if an approved unit size is available at a location that may reduce the risk of harm, approve transfer by a public housing or Section 8 tenant to a different unit in order to reduce the level of risk to the individual. A tenant who requests transfer must attest in such application that the requested transfer is necessary to protect the health or safety of the tenant or another member of the household who is or was the victim of domestic violence, dating violence, or stalking and who reasonably believes that the tenant or other household member will be imminently threatened by harm from further violence if the individual remains in the present dwelling unit. Where appropriate, transfers may be granted from federal public housing to Section 8 and from Section 8 to federal public housing.

B. *No right to transfer.* SHA will make every effort to accommodate requests for transfer when suitable alternative vacant units are available and the circumstances warrant such action. However, except with respect to portability of Section 8 assistance as provided in paragraph IX. D below the decision to grant or refuse to grant a transfer shall lie within the sole discretion of SHA, and this policy does not create any right on the part of any applicant to be granted a transfer.

C. *Family rent obligations.* If the family occupying SHA public housing moves in order to protect the health or safety of a household member, the family's obligation to provide 30 days advance notice of its move shall be waived by the SHA.

D. *Portability.* Notwithstanding the foregoing, a Section 8-assisted tenant will not be denied portability to a unit located in another jurisdiction (notwithstanding the term of the tenant's existing lease has not expired, the tenant has not provided the required notice of vacating to the SHA or the family has not occupied the unit for 12 months) so long as the tenant has complied with all other requirements of the Section 8 program and has moved from the unit in order to protect a health or safety of an individual member of the household who is or has been the victim of domestic violence dating violence or stalking and who reasonably believes that the tenant or other household member will be imminently threatened by harm from further violence if the individual remains in the present dwelling unit.

### X. Relationships with Service Providers

*It is the policy of SHA to cooperate with organizations and entities, both private and governmental that provides shelter and/or services to victims of domestic violence. If SHA staff become aware that an individual assisted by SHA is a victim of domestic violence, dating violence or stalking, SHA will refer the victim to such providers of shelter or services as appropriate. Notwithstanding the foregoing, this Policy does not create any legal obligation requiring SHA either to maintain a relationship with any particular provider of shelter or services to victims*

*or domestic violence or to make a referral in any particular case. SHA's annual public housing agency plan shall describe providers of shelter or services to victims of domestic violence with which SHA has referral or other cooperative relationships.*

**XI. Notification**

*SHA shall provide written notification to applicants, tenants, and Section 8 owners and managers, concerning the rights and obligations created under VAWA relating to confidentiality, denial of assistance and, termination of tenancy or assistance.*

**XII. Relationship with Other Applicable Laws**

*Neither VAWA nor this Policy implementing it shall preempt or supersede any provision of Federal, State or local law that provides greater protection than that provided under VAWA for victims of domestic violence, dating violence or stalking.*

**XIII. Amendment**

*This policy may be amended from time to time by SHA as approved by the SHA Board of Commissioners after consultation with the Resident Advisory Board.*

*Drafted: 6.12.07*

**Attachment MA031 j03**

SOMERVILLE HOUSING AUTHORITY

RESIDENT BOARD MEMBER

As listed in Section

**18. Other Information**

[24 CFR Part 903.7 9 (r)]

The Somerville Housing Authority has a resident commissioner, Mary Griffin, who has been nominated by residents and reappointed by the Mayor of local jurisdiction, Somerville, MA on July 26, 2007 for the remainder of a five-year term.



## SOMERVILLE HOUSING AUTHORITY

30 Memorial Road

Somerville, Massachusetts 02145

Telephone (617) 625-1152 Fax (617) 628-7057 TDD (617) 628-8889

### **ATTACHMENT: MA031 k03**

March 3, 2008

Alan Spera  
Metro Division Director  
U. S. Department of HUD  
O'Neill Federal Building  
10 Causeway St  
Boston, MA 02222-1092

Re: Annual Plan Response

Dear Mr. Spera,

This letter is in response to the Deficiency letter dated February 20, 2008 relating to PHA plan submission MA031v03.

Please be aware that SHA has submitted revisions electronically as MA031v04 and this letter provides narrative answers where appropriate.

#### **Technical Deficiency # 1**

Revision has been made to #18 and Resident Board member has been included in attachments and submitted.

#### **Technical Deficiency # 2**

Revisions have been submitted.

#### **Technical Deficiency # 3**

SHA budgeted \$20,000 per year for Energy Conservation Studies. We expended \$18,748 in FY 05 and \$20,443 in FY 06. We have not expended any funds in FY 07 and 08. The amount of \$39,191 was used to pay our in house energy specialist, Emmett Smith. During this period, we entered into a contract with Power Options to purchase gas from HESS. We locked in a low rate for 1-year and then we renewed it for an additional 1-year. Mr. Smith is conducting daily activities related to these issues and in addition, he worked on energy studies with Ameresco.

#### **Technical Deficiency # 4**

Revised and submitted.

#### **Technical Deficiency # 5**

Revised and submitted

#### **Technical Deficiency # 6**

Revised and submitted

#### **Technical Deficiency # 7**

The title of this item did not accurately reflect the actual condition and needs to be revised accordingly. The balconies are concrete and sections are chipping and loose and the rails are wrought iron with varying degrees of rusting and deterioration. These repairs must be done prior to painting and preservation.

Appropriate forms have been revised and submitted.

**Technical Deficiency # 8**

Revised and submitted

**Technical Deficiency # 9**

Revised and submitted

**Technical Deficiency # 10**

Revised and submitted

**Technical Deficiency # 11**

Revised and submitted

**Technical Deficiency # 12**

Revised and submitted

**Technical Deficiency # 13**

ActivitiesCenter Coordinator: These funds provide two (2) Part-time staff member who supervise the Computer center and assist children with a variety of activities. The Resident & Youth Training Activities: The activities included;

- YMCA: summer day camp
- Arts Council: Books of Hope project
- Boys & Girls Club: summer camp
- Somerville Mental Health: Misc activities
- Mystic Learning Center: Teen choice Program

**Technical Deficiency # 14**

Revised and submitted

**Technical Deficiency #15**

The SHA respectfully disagrees with this issue being characterized as a “deficiency”. The Administration Building has been a Federal property for more than 20 years and has been supported and recognized as such by HUD. SHA has complied with HUD’s recommendation to file an Amendment to the Declaration of Trust for the sole purpose of solidifying its use. SHA has recorded the document with the South Middlesex Registry of Deeds BK: 50557 PG: 427 and submitted same to HUD field office.

SHA has requested all HUD records pertaining to this issue and any documents that contradict this mutually recognized use. We have not located any HUD correspondence to the SHA suggesting this property was not included in the Federal portfolio.

The SHA has submitted numerous supportive documents acknowledging the property designation and SHA is awaiting further correspondence from HUD.

No revision has been made to the PHA Plan.

Sincerely,

Joseph Macaluso  
Executive Director

## SHA COMMUNITY SERVICE REQUIREMENTS

The SHA Community Service program requires adult residents in federal housing, who are non-exempt, to provide 8 hours of community service per month in order to remain eligible for public housing.

The Somerville Housing Authority assists our residents in identifying work opportunities and maintains a list of agencies where residents can perform this service requirement. (See below)

To date, all SHA residents required to perform community service have participated in SHA sponsored opportunities such as cleaning grounds and hallways.

### **Community Service Agencies Partnering with SHA**

Somerville/Cambridge Elder Services  
617-628-2601

Somerville Homeless Coalition/Project Soup  
617-623-6111

Somerville Hospital/Cambridge Health Alliance  
617-591-4414 - Somerville  
617-665-1986 - Cambridge

Catholic Charities  
617-451-7979 x 4813

Little Sister of the Poor  
617-776-4420 x 312

Walnut Street Center  
617-629-3589

Boys and Girls Club  
617-628-4665