Moving Forward

Families Advancing to Self-Reliance

Moving Forward
Fiscal Year 2009-2010
ANNUAL PLAN

Revised April 14, 2009

A Charlotte Housing Authority Initiative

Housing Authority of the City of Charlotte, NC

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SUMMARY OF MTW INITIATIVES			
PAGE	**ONGOING INITIATVES**	**DESCRIPTION**	**FISCAL YEAR IMPLEMENTED**
39	Site-based waiting lists Public Housing and Project Based Section 8.	All public housing waiting lists are managed at the site level. Project-based Section 8 properties maintain separate waiting lists.	2008 - 2009
40	Alternate Review Process	Beginning April 2009 re-certifications for senior/disabled will be bi-annual; criminal background checks will be conducted at recertification; and rent reform initiated.	2008 - 2009
41	Section 8 Property Rating System	In 2007, a quantitative evaluation rating system for the exterior appearance of a Section 8 property was developed to improve the housing quality standards of property owners that participate in the program.	2007 - 2008
43	Participant and landlord tracking program	The University of North Carolina at Charlotte's (UNCC) utilized a Geographic Information Science (GIS) mapping system to identify vouchers holders within Mecklenburg County. CHA will analyze non-concentrated areas to determine the need to increase the fair market rents in specific census tracts.	2007 - 2008
44	Affordable Housing Impact Studies	CHA commissioned UNCC to research the pattern and density of affordable housing and evaluate the association between the housing stock and crime rate, housing and property values, and school equity in surrounding residential communities.	2007 - 2008
46	Section 8 Training	CHA and Central Piedmont Community College conduct "Good Neighbors" type training to all new Section 8 participants to assist families in their acclimation into a neighborhood. In April 2009, the "Good Neighbor" Training will be mandatory for all Section 8 participants.	2007 - 2008
47	Assess Section 8 program participants	CHA surveyed all Section 8 program participants to measure their capacity for independent living. CHA will use survey results to connect them with the services necessary to facilitate their progress toward that goal.	2008 - 2009
48	Modify Section 8 inspection procedures	CHA received approval from HUD to waive the requirement for an initial Housing Quality Standards (HQS) inspection on newly constructed Section 8 units and	2008 - 2009

		utilize local building standards inspection and subsequent issuance of a Certificate of Occupancy (CO) as a substitution of the initial or move-in inspection	
48	Amend Section 8 Housing Assistance Payment (HAP) Agreement	CHA will amend the HAP Agreement to make changes such as inclusion of revised inspection procedures, penalties for landlord non-compliance with property rating system, and require families to update needs assessment as part of recertification.	2008 - 2009
50	Currents of Change	The Currents of Change Program is designed to stabilize and improve families by fortifying them through education, life skills, motivation and employment training to compete in the economic marketplace.	2008 - 2009
57	Youth Services	CHA is partnering with community organizations and the local school system to pool resources to provide services to young residents in CHA communities and address school truancy.	2008 - 2009
61	Single fund budget with full flexibility	CHA combined its public housing operating subsidies, public housing capital funds and its Housing Choice Voucher Program assistance into a single, authority-wide funding source.	2008 - 2009
62	Adopt investment policies consistent with state law	CHA adopted investment policies that are consistent with North Carolina state law to achieve a portfolio which is safer, more liquid and obtains competitive yield.	2008 - 2009
63	Use single fund flexibility to develop additional units	CHA will use block grant funding to leverage financing for the development of 100 new or rehabilitated affordable housing units each year of the MTW program.	2008 - 2009
68	Partner with CMS for mixed income affordable units	Exploring partnership with Charlotte Mecklenburg Schools to produce mixed-income affordable housing units.	2008 - 2009
70	Streamline Project-Based Section 8 Process	Simplify the selection process in order to maximize the number of quality Section 8 assisted units throughout Charlotte.	2008 - 2009
73	Increase acquisition and rehabilitation of existing multifamily properties	CHA will establish a strategy to increase the acquisition and rehabilitation of existing multifamily properties.	2008 - 2009
74	Land acquisition	CHA will design local standards to guide land purchases in desirable, rapidly growing areas to provide more housing choices.	2008 - 2009
76	Streamline development approval process	CHA will streamline the development approval process to eliminate multiple layered reviews.	2008 - 2009

77	Develop local design standards	CHA will adopt local design standards that will correlate with other funding sources available in Charlotte and the State of North Carolina.	2008 - 2009
78	Establish local total development cost (TDC) limits	CHA will adopt local TDC standards that reflect local marketplace conditions for quality construction in Charlotte.	2008 - 2009
79	Revise subsidy structure for developments in which CHA is direct developer	CHA will design a new rent structure for new and rehabilitated Public Housing for working families who will pay 30% of their income for rent to increase production.	2008 - 2009
80	Housing for persons with disabilities, special needs and homeless	CHA will create and enhance relationships with local social service provider agencies that provide supportive housing.	2008 - 2009
	NEW INITIATIVES	**DESCRIPTION**	
27	Rent Reform and Work Requirement	Proposing modification of rent calculation and increase in minimal rent. A hardship policy will be in place. Implement a work requirement that combines financial incentives and work support.	2009 - 2010
34	Administrative Efficiency	The Charlotte Housing Authority would like to revise HUD Form 52646 (Housing Choice Voucher) to allow for more than one extension approval and to incorporate additional family obligations.	2009 - 2010
36	Resident Safety Initiative	The Resident Safety Department will expand the types of crime prevention and program enforcement initiatives for both CHA public housing sites and Section 8 properties.	2009 - 2010

APPENDICES

APPENDIX A	BOARD RESOLUTION
APPENDIX B	CERTIFICATIONS FOR FY 2009 – 2010 MTW ANNUAL PLAN
APPENDIX C	PUBLIC HEARING/RESIDENT COMMENTS DOCUMENTATION
APPENDIX D	SINGLE FUND BUDGET WITH FULL FLEXIBILITY COMPARISON
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INTRODUCTION

Moving To Work Transition

The Charlotte Housing Authority (CHA) is one of 30 housing authorities across the country participating in the United States Department of Housing and Urban Development (HUD) "Moving to Work" (MTW) Demonstration Program, which allows CHA to test innovative methods to improve housing services and better meet local needs. As a MTW Authority, CHA may propose and implement housing and self-sufficiency strategies which may be exempted from existing public housing and tenant-based Section 8 regulations. In addition, CHA is permitted to combine operating, capital, and tenant-based assistance funds into a single agency-wide funding source, as approved by HUD.

The Charlotte Housing Authority signed an Interim Agreement in December 2006. The Interim Agreement granted authorizations related to the Section 8 Program only. The status of these initiatives was documented in the Fiscal Year 2007 – 2008 MTW Annual Report. CHA gained full authority upon execution of the MTW agreement in December 2007. CHA's executed an Amended and Restated MTW Agreement in April 2008 which extends through 2018.

During its first year, the Authority utilized MTW flexibility to implement several initiatives that are aligned with the following corporate goals: 1) develop collaborative relationships, 2) facilitate the development of client families to reach their highest potential, 3) maximize the economic, physical and social value of the real estate portfolio, 4) ensure that the Authority attains long-term financial viability and 5) provide the highest quality, most cost-effective real estate management services. These initiatives are outlined in the ongoing MTW activities section of this Annual Plan.[1] This Annual Plan details the Charlotte Housing Authority's ongoing and proposed activities for its second year with broad MTW authority.

The Charlotte MTW Program continues to focus on initiatives that address the following MTW objectives:

- Promote work and self sufficiency for public housing residents and Section 8 participants
- Expand housing choices for low income families
- Achieve administrative cost efficiencies and savings

Major Themes

In the FY 2008 – 2009 Annual Plan, Charlotte Housing Authority noted eight major themes for the local MTW program that the Board of Commissioners accepted. Below is a listing of the major themes and the current status:

- Rent Simplification

[1] The FY 2008 – 2009 MTW Annual Report will be submitted in June 2009.

    - CHA will implement a new rent structure for all public housing and Section 8 Program participants. The new structure is a modified formula for calculating families' rent obligation to provide a strong financial incentive for residents and participants to increase their earnings.
- Family Tiering System
    - Based on assessments conducted by Central Piedmont Community College (CPCC) of the public housing households in 2007 and Section 8 household participants 2008, residents and participants are divided into four tiers according to the type of services they need to become self sufficient.
- Block Grant Funding
    - CHA created a block grant funding source which allows the allocation of resources based on the needs of the organization and most effective use of funds.
- Education and Youth Programs
    - CHA is collaborating with a number of organizations and agencies to provide comprehensive wrap around services to address the academic, health, and social well being of CHA youth.
- Provider Based Rental Subsidy Program
    - CHA is seeking approval from HUD to implement a Provider-Based Rental Subsidy Program. The program will provide funding to non-profit partner agencies to subsidize rent amounts throughout the city for participants in their self-sufficiency programs. The "shallow subsidy" will be a set amount based on bedroom size.
- Mixed Income vs. All Public Housing Sites
    - CHA is assessing whether mixed income developments or developments that are all public housing are best for residents, the agency, and the Charlotte community.
- Work Requirement
    - CHA is introducing an incentivized work requirement in April 2009 that will provide an increase in household income. PH Residents and Section 8 participants will have access to life skill and work support programs to be delivered by community partners. The work requirement will apply to all non-elderly, non-disabled residents.

Annual Plan Development Process

This document is the Charlotte Housing Authority's FY 2009-2010 Annual MTW Plan for the period of April 1, 2009 – March 31, 2010. The initiatives developed were as a result of brainstorming sessions with staff, MTW suggestion surveys at public housing sites and the Section 8 Administrative office, as well as community meetings focused on MTW. Respondents offered many suggestions on how rent should be calculated, education and youth programs, in addition to how to structure a work requirement. These suggestions were taken into consideration as the initiatives were developed and for future MTW planning.

The common responses from the survey responders were centered on improving housing qualities and opportunities for those that work, extending the recertification period for those with stable incomes, providing assistance with childcare and transportation, and access to educational workshops and job training for both youth and adults. The survey feedback was taken into consideration when developing the housing and self sufficiency initiatives.

Additional feedback was provided through quarterly meetings with the Resident Advisory Council (RAC) Presidents to discuss and develop MTW initiatives. CHA will continue to work with the residents and community partners to ensure successful implementation of Moving to Work for the Charlotte community.

A local public relations firm was engaged to research public perception of CHA and its clientele to create a brand identity and social marketing campaign for the initiative. The name Moving Forward was branded the new MTW name for Charlotte. CHA launched a social marketing campaign in March 2009 to introduce the Moving Forward initiative to the Charlotte area and to communicate the importance of affordable housing for the low income families CHA serves. The initiative has far-reaching implications for everyone who lives in the community and requires informing all of our constituents, including the general public. In addition to informing the public about the Authority's Moving Forward efforts, the goal of the campaign was to build public support for the initiative by changing damaging or unfair misperceptions about residents of public housing and participants in the Section 8 program.

The FY 2009 – 2010 MTW Annual Plan introduces innovative ideas to the Charlotte community that could not have been implemented without MTW flexibility.

Strategic Business Areas

The Charlotte Housing Authority has three strategic business divisions: Operations, Finance and Administration and Real Estate Development.

Operations Division

The Charlotte Housing Authority's Operations Division provides decent, safe and affordable housing to low and moderate-income families while supporting their efforts to achieve self-sufficiency. Operations is responsible for the daily management of all subsidized housing owned by the Authority and its subsidiaries, all programs to increase resident social and economic capacity, and all projects associated with the preservation of the assets in the Authorities real estate portfolio. There are six departments within the Operations Division: Property Management, Capital Assets, Section 8, Client Services, Resident Safety, and Asset Management.

CHA has received a *High Performer* designation for fiscal years ending 2006 and 2007 for the Public Housing program and 2004 - 2007 for its Section 8 program from the U.S. Department of Housing and Urban Development (HUD). The following were the agencies most recent scores: Public Housing Assessment System (PHAS)-95 and Section Eight Management Assessment Program (SEMAP)-99. CHA will hire a third party agency to review PHAS and SEMAP assessments using the measures from HUD at the end of the fiscal year to determine the Authority's status.

Finance and Administration Division

The Finance and Administration Division provides expert supportive services and administrative data to ensure that all other business areas of the Authority are able to contribute to the achievement of the mission of the organization. There are five departments within the Finance and Administration Area: Accounting, Budgeting, Human Resources, Management Information Systems and Procurement.

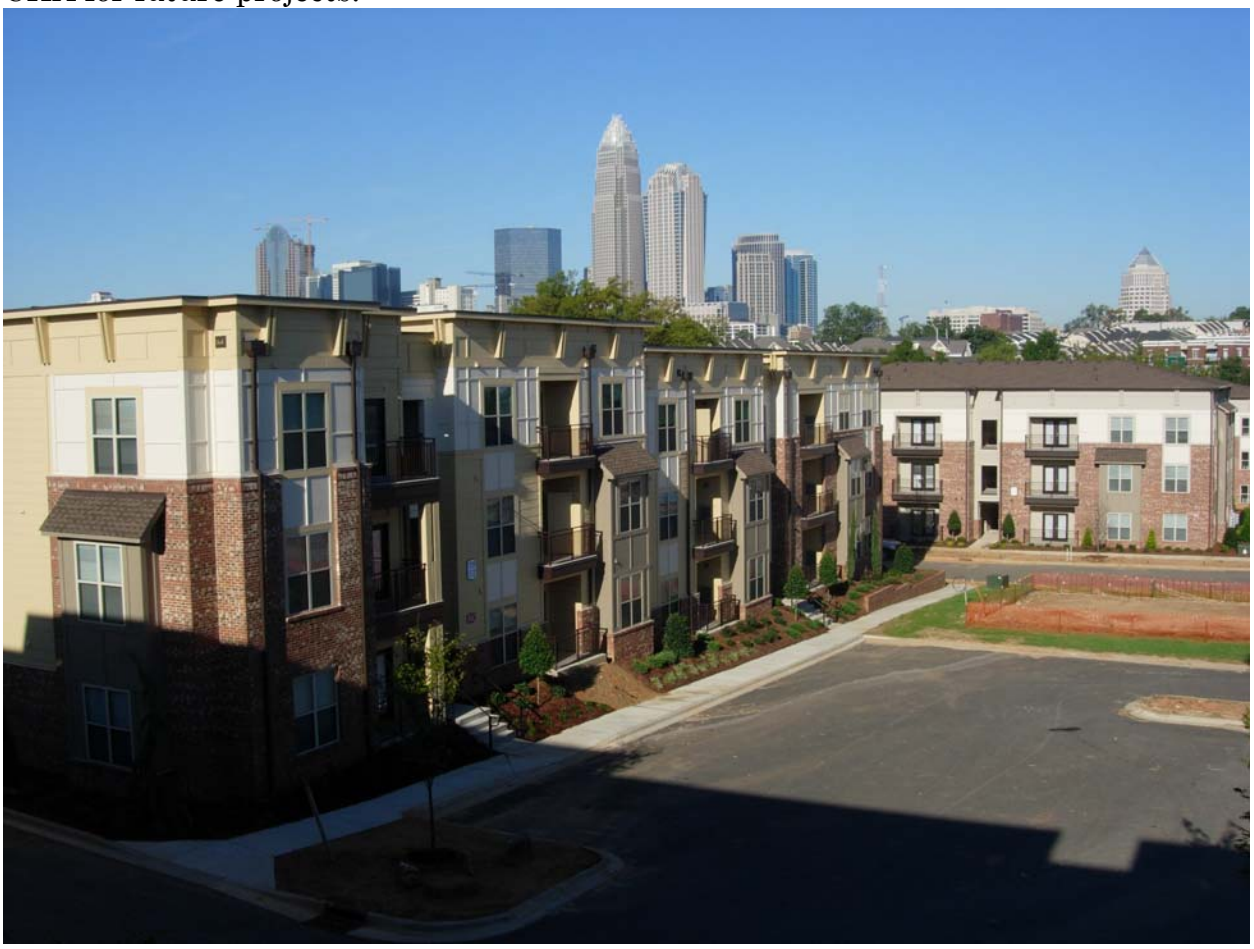
The Finance and Administration Division is responsible for managing all financial aspects of the Authority, enabling employees to contribute at optimum levels towards the success of the mission, providing all users with technical tools that will enhance information management and managing all purchases made by the Authority. As HUD drives its processes more to stand alone project compliance and reporting, this department will continue to be very conscientious and diligent in its efforts.

The Finance and Administration area strives for excellence to ensure that CHA is financially sound and continues to move towards attaining long-term financial viability. CHA has received the Certificate of Achievement for Excellence in Financial Reporting by the Government Finance Officers Association (GFOA) of the

United Stated and Canada for the past three fiscal years. Also, the Finance Department was awarded the Financial Reporting Achievement Award by GFOA.

Real Estate Development Division

The Real Estate Development Division strives to provide the maximum number of high quality units in mixed-income developments that serve our target market and promote economic integration. An important component to the success of this area is its ability to work with the development community to leverage the existing resources and broaden the pool of partners and funding sources. The Real Estate Development business division is responsible for developing or acquiring mixed-income communities that include affordable/low-income units. The group is also charged with expanding the pool of developers and funding sources available to CHA for future projects.



Seigle Pointe, Charlotte, NC

The department has a strong record of obtaining mixed financing and leveraging funding that has resulted in the success of four major redevelopments of former public housing complexes. The Real Estate Development Division is very creative, sensitive to the needs of development partners, and production oriented. In the past 10 years, approximately 1,000 public housing units have been created in new

mixed-income communities developed through four successful HOPE VI grants through the production of on-site and off-site housing in over 25 new developments throughout the City of Charlotte.

Asset Management

The Charlotte Housing Authority is one of the first Authorities to implement Asset Management. This effort began in 2002. In Fiscal Year 2002-2003, the management and staff of CHA worked diligently to prepare a budget based on the priorities as stated by the Board which encouraged Project Based Asset Management at the authority level.

To obtain a balanced budget, 51.5 positions were eliminated. These eliminations occurred across the following areas: executive, human resources, internal audit, corporate communications, finance, accounting, procurement, planning and development, Section 8, housing management administration, housing management sites, community safety, maintenance administration, central maintenance laborers, resident services, case managers, human services, resident initiatives, Section 3, Gateway to Family Self Sufficiency and modernization. Fifteen of these positions were central office administrative positions and six were from maintenance administration.

The Fiscal Year 2003-2004 budget moved the Housing Authority closer to its project based asset management vision by placing increased emphasis and resources at the housing project level. The site-based management concept included all vacancy preparations and customer response responsibilities for daytime and after hours calls. These initiatives, coupled with the MIS hardware and software replacements, provided the Authority with the tools necessary to make informed decisions about site performance and site viability.

The Fiscal Year 2004-2005 budget continued the Housing Authority's strategic asset management vision by continued placement of emphasis and resources at the housing project level. The site-based management concept included vacancy preparations, routine maintenance and all other customer service responsibilities for daytime and after hours. Highlighting this concept with an increase of over $170,000 in that year's budget, coupled with the MIS hardware and software replacements that came to fruition, provided the Authority with the additional tools necessary to make informed decisions about site performance and site viability.

In Fiscal Year 2005-2006, CHA continued to strengthen its position in project based asset management. Any decrease in expenses or revenue was primarily due to continued efforts to use Authority resources efficiently. During January 2006, a team from the HUD Real Estate Assessment Center (REAC) office visited CHA and prepared a case study based on the accomplishments of the transition to project based asset management.

In Fiscal Year 2006-2007 and in Fiscal Year 2007-2008, CHA continued to strengthen its position in project based asset management as evidenced by requests for assistance from other Public Housing Authorities (PHA) and speaking to state and national groups based on HUD's visit and the favorable comments made based on that visit in the HUD case study.

Strategic Asset Decision Making Model

CHA has established a detailed analytical tool to assist staff in making asset disposition decisions. The Strategic Asset Model (SAM) is the foundation for determining which properties possess the most favorable characteristics and those that may be an unsustainable drain on CHA resources. As CHA operates as a Moving to Work Agency, SAM will enable the agency to objectively determine if a property should be maintained, substantially rehabilitated, placed on the market for sale or considered for an alternative use. Each asset, to be assessed through SAM, will be classified into one of four categories.

1. *Performing*: The units are financially self-sustaining. Most of the mixed-income portfolio falls into this category.

2. *Reposition/convert*: This category includes properties for which the underlying land is so valuable that the Authority can create more housing opportunities by using the proceeds to create new units. At the other end of the spectrum are properties which are functionally obsolete and thus not candidates for rehabilitation.

3. *Preserve/rehab*: Property substantially meets CHA's community standards and rehabilitation is warranted;

4. *Defer:* These properties do not warrant further investment. Accommodations should be made for health and safety, but the properties will be slated for demolition at the end of their useful lives.

SAM captures specific site data about each asset such as number of units, acres, and current zoning. CHA reviews the current financials of each property to determine decision making factors such as net operating income and capital needs. Area characteristics such as locational policy designation, area median income, and other significant real estate developments within close proximity of the property will also be outlined. Other data that is captured includes, but is not limited to, appraised value, estimated replacement value, estimated appreciation in value, livability statistics, political environment and crime statistics.

The following guiding principles will be used as guidelines when making strategic decisions concerning each asset:

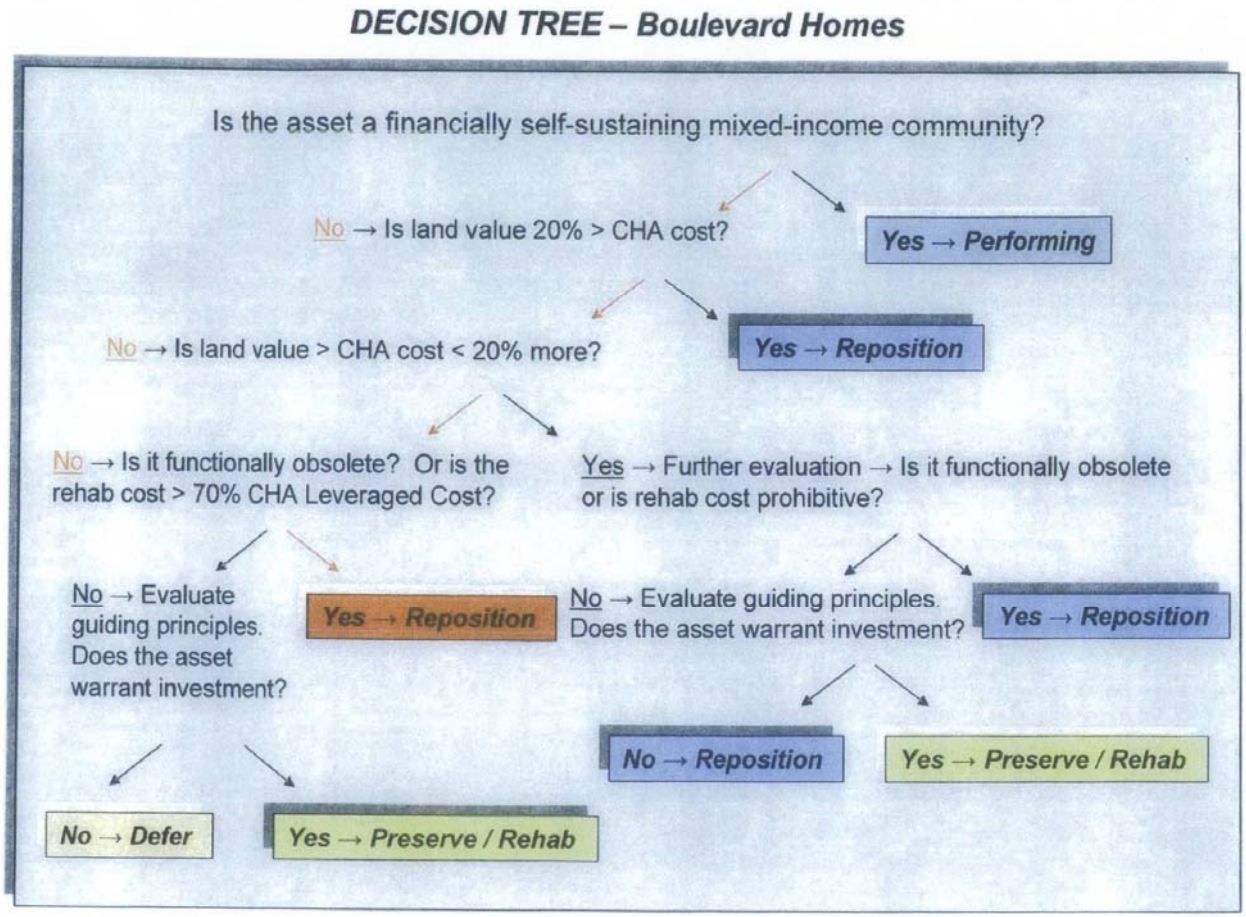
1. Deconcentration: CHA's goal is to promote the de-concentration of affordable housing. This goal applies both to the concentration of low-income housing in particular areas of the City and the concentration of many low-income units in one asset.
2. Financial Viability: Every community should maximize its contribution to the long-term financial viability of CHA, so that the Authority can continue to meet the mission of providing the best possible housing for low-income families.
3. Manageability: Each asset should be positioned so that the Authority can provide the highest quality, most cost efficient management services.

During Fiscal Year 2008-2009, CHA staff obtained appraisals of all assets, conducted on-site interviews with property managers and evaluated each asset in accordance with the standards set forth in the Strategic Portfolio Management Policy, as approved by the Board of Commissioners. These results, along with SAM, will be captured in the Asset Management and Information database which is in the developmental phase. SAM's first year efforts resulted in a 10-year Real Estate plan. The Asset Management and Information database is anticipated to be a powerful, cross-functional tool integrating various business lines and functions of CHA including Operations, Real Estate Development and Finance and Administration.

As assets are repositioned, decisions on the location of replacement housing will be driven through close coordination with the City of Charlotte's Locational Policy and in accordance with a policy already adopted by the CHA Board. In an effort to support the de-concentration of poverty and to increase access of low-income families to high-amenity neighborhoods, the City created its Locational Policy. This policy evaluates each neighborhood and characterizes them as preferred, permissible or prohibited for additional affordable housing development. Where an existing CHA asset is in a preferred neighborhood, CHA replacement housing will be relocated on the site or within a two mile radius of the site, to ensure that affordable housing in existing high-amenity neighborhoods is preserved. Where an existing CHA asset is in a permissible or prohibited neighborhood, CHA will evaluate the opportunities for using the proceeds from a sale or repositioning of the asset to build or acquire units in higher-amenity neighborhoods.

The Strategic Portfolio Management Policy closely follows the statutory goals of MTW in that the policy is intended to achieve greater cost effectiveness by applying a tool that will maximize the economic, social and physical value of CHA's real estate. Second, the policy evaluates whether each community meets the social goals of the families and by location, design and amenities, maximizes their ability to move to economic self-sufficiency. Finally, it meets the third statutory objective because the goal is to create as many opportunities as possible for families to live in self-supporting mixed-income communities.

SAM will provide a measurable tool for making logic-based, financially-driven decisions about repositioning current assets, while still being able to respond to changing market conditions. This will result in an outlined development plan and give more predictability to our development patterns both for our residents and our funders and community supporters. This is particularly important in a rapidly growing and developing community like Charlotte. SAM will be a valuable tool as CHA continues to make decisions about our physical assets and our families during the MTW demonstration. Some decisions to implement specific initiatives will be made based on the results after all assets have been analyzed through SAM.



GENERAL HOUSING AUTHORITY INFORMATION

GENERAL HOUSING AUTHORITY OPERATING INFORMATION

The Charlotte Housing Authority serves those Charlotte families for whom market rate housing is unaffordable. Our mission is to provide these families with safe, decent and sanitary housing. This section of the Annual Plan provides details on the Charlotte Housing Authority's existing and planned housing stock, leasing information and waiting lists. It is important to note that some of the information is estimated and may be subject to change during the Plan year.

Housing Stock Information

- **Number of public housing units planned.**
  Currently the Charlotte Housing Authority owns or provides oversight for 3,041 units. By the end of the fiscal year CHA will bring 249 units on line. An additional 85 units in newly constructed or acquired mixed income communities are planned for FY 09-10, resulting in a total of 3,375 existing ACC units. These units are contained in both the CHA portfolio and that of private partners. The unit mix of the existing portfolio provides a total of 6,369 bedrooms distributed as exhibited in Appendix J.

- **General description of any planned significant capital expenditures by development.**
  We will continue with our preservation goals during Fiscal Year 2009 – 2010 and have plans for a major renovation at Robinsdale Apartments (32 units) and the completion of the final phase of a major renovation (72 units) at Southside Homes, our largest and oldest property. Please refer to Appendix K for a complete list of planned improvements. The total sum of the capital improvements for FY 09-10 is approximated at $6,721,996.00.

- **Description of any new public housing units to be added during the year by development, specifying size.**
  We will have an additional 85 new public housing units coming on line this fiscal year in newly constructed or acquired mixed income communities. These new developments are part of CHA's previous operations and are not as a result of our planned initiatives. The implementation of our new initiatives will likely not produce additional units until the following fiscal year. The new sites are listed in the following table:

Site	Total Units	0BR	1BR	2BR	3BR	Total BRs	Planned Lease Up Month
Ashley Park (MF)	22	0	0	22	0	44	9/2009
McCreesh	63	63	0	0	0	63	3/2010
Total	85	63	0	22	0	107	

- **Units planned for demolition.**
  Under normal operations, CHA is planning to dispose of Hall House which contains 190 units. All elderly/disabled residents have been relocated. As outlined in our disposition application to HUD, in order to provide as many high quality affordable units in Charlotte as possible, CHA used its Strategic Asset Management (SAM) Model to identify properties that are underutilized and seeks to provide equity to create additional housing. CHA identified Hall House as an underutilized asset due to its location, zoning, and the use of most of the site as surface parking. The zoning is Uptown Mixed-Use District (UMUD). Additionally, the property did not provide the quality of living CHA sought for senior residents. The land area consists of 2,173 acres or 96,644 square feet and includes a surface parking area with 120 spaces. Although the site is currently being used for senior/disabled housing, its highest and best use is Mixed-Use development (as identified in two separate appraisals). A significant amount of additional square footage could be added in the UMUD zoning. Additionally, surface parking lots are not the best use of this expensive uptown land.

  In addition to the evaluation of the asset as underutilized from both a physical and economic perspective, CHA determined that the property was becoming functionally obsolete and exceeded development cost limits. The functional utility analysis is also included in the justification section of CHA's disposition application. Based on the ceiling heights, minimal amenities, small exterior windows and limited depth from exterior walls to the hallways, the appraisal found that "the subject building's interior is considered to have inadequate functional utility with substantial obsolescence."

  Sale proceeds will be used to develop additional affordable housing units in the next 2 – 3 years.

  As noted in the Real Estate Initiatives section F2, CHA also plans to demolish Boulevard Homes in order to redevelop the property as an education-centered community. Appendix I documents additional demolition/disposition activity proposed by the Charlotte Housing Authority.

- **Number of Section 8 vouchers authorized.**
  There are 4, 260 Section 8 (HCV) units authorized as of October 1, 2008. We will use 210 of these vouchers authorized for Project Based Section 8 assistance from our existing budget authority. This is not associated with the planned initiatives which are not expected to produce additional Project Based Section 8 units this fiscal year. The Project Based Section 8 units authorized are as follows:

Site	Total Units	1BR	2BR	3BR	4BR	Total BRs	Planned Lease Up Month
McAden Park	30	3	18	9	0	56	Leased 2007
Prosperity Creek	84	72	12	0	0	96	Leased 2007
940 Brevard	60	60	0	0	0	60	10/2008
Seigle Point	18	3	14	1	0	32	12/2008
SpringCroft	18	18	0	0	0	18	12/2008
Total	**210**	**156**	**44**	**10**	**0**	**262**	

The Park at Oaklawn, Charlotte NC

- **Number and type of other housing managed by the Agency (to include tax credit, state funded, Project Based Section 8, and market rate)**

The following is a list of properties owned or managed by CHA or its subsidiary. All developments are located within the City of Charlotte and are in affordable market areas (50% - 60% of AMI):

Site	Total Units	1BR	2BR	3BR	4BR	Market	ACC %/No.	Owned by	Managed by CHA
Grove Place	36	0	24	12	0	100%	0%	YES Horizon	YES Horizon
Oak Valley	50	0	32	18	0	100%	0%	YES Horizon	YES Horizon
Valley View	50	0	30	20	0	100%	0%	YES Horizon	YES Horizon
Seneca Woods	50	0	24	24	2	100%	0% 17	YES	NO (private)
McAlpine	113	113	0	0	0	77%	23% 26	YES	NO (private)
Glen Cove	50	0	30	20	0	80%	20% 10	YES	NO (private)
Arbor Glen 50	50	8	12	26	4	50%	50% 25	YES	NO (private)
Fairmarket	60	0	36	24	0	73%	27% 16	YES	NO (private)
Villa Courts	36	0	36	0	0	0%	100% S8 multi family	YES	YES
Totals	**495**	**121**	**224**	**144**	**6**		**78**		

It should be noted the count of ACC units in the previous chart are included as part of the ACC units in number of public housing units planned.

- Through its subsidiaries, the Agency owns or manages affordable market rate units, multifamily project-based Section 8, participating in HOPE VI/tax-credit financed properties with Public Housing and/or Project Based Section 8 units.

Lease Up Information

- **Number of public housing units leased**
  Currently, there are 3,290 public housing units. It is anticipated that during the fiscal year all 190 units in the Hall House project (planned disposition) will be removed from inventory. This will leave a balance of 3,100 available for leasing. We expect to maintain our current 99% occupancy rate during the year of 3,069 units plus the 85 additional units coming on line during the fiscal year for a total of 3,154 leased units.

- **Number of Section 8 vouchers under lease**
  Ninety nine percent (99%) of the authorized vouchers are under lease for a total of 4,260 vouchers. This includes the 242 Project Based Section 8 units already authorized (not a part of newly planned initiatives). Please refer to the table above for a breakdown of the PBS8 projects.

- **Description of issues relating to any difficulties in leasing units (HCV or public housing).**
  In May 2008, all public housing developments became site-based waiting lists and applicants may be hesitant to select large family sites and typically 0 bedroom units (elderly/disabled) are the least desired.

Waiting List Information

1. **Description of waiting lists (site-based, community-wide, HCV, merged).**
   In May 2008, the Charlotte Housing Authority changed the waiting list process from a centralized system to a site based system. CHA has site-based waiting lists for all public housing communities. Project-Based Section 8 units are offered only through a site-based waiting list at the respective property. Project-Based Section 8 or Public Housing assistance that may be offered via special programs for the homeless and/or disabled may be offered via referrals.

- **Number of families on the waiting list(s) and if the list(s) are open or closed.**
  The changes in the number of families on the Section 8 waiting list(s) will be based on the vouchers issued at turnovers. The Section 8 list will remain closed.

  Two of the Charlotte Housing Authority's multi-family apartment communities, Boulevard Homes and Dillehay Courts, opened their waiting lists for three, four and five-bedroom apartments in October 2008. At the time of the conversion to site based waiting list and implementation, the waiting lists were still too large to open and all site-based lists remained closed, with the exception of the two sites listed above.

- **Date the waiting list was last purged.**
  All applications on the Section 8 waiting list were last purged in April 2008. The Public Housing waiting list was last purged in August 2007.

	As of Dec. 2008
Public Housing Waiting List	2,121
Section 8 Waiting List	3,618

THE LONG TERM PLAN

STRIDES TOWARD THE LONG TERM PLAN

Defining the Scope

In Fiscal Year 2008 – 2009 MTW Annual Plan, the Charlotte Housing Authority reported that Self Sufficiency strategies, Educating Children and Enhancing the Portfolio were major focus areas of the program that were being addressed as a comprehensive solution to transition low income families to self sufficiency. The Charlotte Housing Authority's Long Term Plan has not changed and the focus remains the same.

The City of Charlotte local government commissioned a study which identified a 17,000 housing shortage for low income families that are 24% of AMI and below. The Charlotte Housing Authority has taken the overwhelming task to address the need. MTW flexibility is critical in our efforts to serve more families. The Long Term Plan will assist the City of Charlotte in serving the 17,000 households by freeing up units, decreasing CHA subsidies to households which will allow additional households to be served and reduction in the number of individuals who return to the waiting list.

Self Sufficiency

Self sufficiency strategies include the Resident Opportunity for Self Sufficiency (ROSS), Currents of Change Program, a Service Coordinator for the Elderly and Disabled and transportation solutions for working families. CHA's Client Services Division has developed a Currents of Change Program which incorporates the newly designed Gateway, Gateway II and Gateway III Programs.

A Service Coordinator position was developed to assist the Property Managers in addressing issues with the Senior and Disabled population. The Service Coordinator receives referrals from the Property Manager or residents themselves. The Service Coordinator in turn makes referrals to Adult Protective Services, Home Health Agencies, and Mental Health Agencies. Assistance is provided with Medicare and Medicaid Issues, Special Transportation, employment for those who can work, and any other referral to better the quality of life of those who reside in our elderly and disabled facilities.

Transportation is one of the obstacles to self sufficiency that CHA is addressing. Current data on our family heads of household show that 34% have income from wages, while 43% depend on income from programs commonly referred to as welfare, disability, or other income (i.e. child support). Twenty-six (26%) percent of our current family households report no income at all.
In 2007 the Center for Applied Research at Central Piedmont Community College (CPCC) released the results of a study requested by CHA entitled "An Assessment of Public Housing Residents for The Moving to Work Program". Thirty four (34%) of family heads of households responding to the survey said that transportation was

their major barrier to employment, followed by child care (31%) and a lack of work experience (23%).

The Charlotte Area Transportation System (CATS) has made a provisional Jobs Access and Reverse Commute grant award to CHA for $100,859. CHA will use these funds to help remove one of those three barriers to work by offering bus passes to those residents who have job interviews, attend job training programs, then start and keep a full-time job. An anticipated 2,632 residents within the Public Housing and Section 8 Program will receive bus passes to attend job interviews, job training or work. The bus passes will be an incentive for those already working.

The Charlotte Housing Authority is tracking its success in self-sufficiency initiatives by:

1. The employment rate for able-bodied heads of households and other family members

2. The number of family members in training and/or education programs

3. The increase in average and median income of families (all sources and earned income) (excluding seniors & disabled families)

4. Amount of funds leveraged for supportive services

Educating Children

A variety of youth initiatives are underway and in planning stages with the goal to decrease the generational poverty that is ingrained in our communities. The measures are:

1. The number of children who enter post secondary education

2. Percent increase in number of CHA students that enter the Charlotte Housing Authority Scholarship Fund program

Enhancing the Portfolio

Charlotte Housing Authority's Real Estate Division long term plans involve strategies to create safe environments that are economically self-sustaining and interface with the private sector. An overwhelming response to the MTW suggestion surveys favored mixed income communities in order to promote self sufficiency among residents by exposing them to lifestyles of households that are financially independent.

The Real Estate Division is tracking efforts to decrease deconcentration with the following measures over the next 10 years:

1. The number of housing units in mixed-income environments

2. The distribution of housing units and housing opportunities (a) Section 9 and (b) Project-based Section 8

PROPOSED MTW ACTIVITIES: HUD APPROVAL REQUESTED

PROPOSED MTW ACTIVITIES: HUD APPROVAL REQUESTED

This section describes the proposed initiatives CHA is seeking HUD approval for implementation in Fiscal Year 2009 – 2010. In summary, CHA will implement a Rent Reform and Work Requirement for all eligible public housing residents, Section 8 Voucher recipients and Project Based Section 8 residents, including any project based Section 8 units that have been or will be acquired by CHA; provide funding to non-profit partner agencies who will use the funding to rent units throughout the city for participants in their self-sufficiency programs; and expand the types of crime prevention initiatives and program enforcement initiatives for both CHA public housing sites and Section 8 properties. CHA's participation in MTW allows the flexibility to introduce new initiatives and evaluate them ongoing for effectiveness and efficiency and modify or remove initiatives as needed.

OPERATIONS

A1. Rent Reform and Work Requirement for Public Housing and Section 8 Program

Making Work Pay – A Proposed Plan to Boost Employment, Earnings, and Assets Among Residents Served by the Charlotte Housing Authority

The Charlotte Housing Authority (CHA) recognizes that housing assistance can and should provide a stable platform for families to build assets and make progress toward economic self-sufficiency. To more effectively achieve these goals, CHA plans to adopt certain complimentary policies through its Moving to Work authority. These policies include:

- **Financial Incentives** – strong financial incentives for families to work full-time and increase their earnings

- **Asset Growth** – a mechanism for families to build assets as their earnings grow.

- **Work Supports** – employment services to help families find and keep jobs and overcome barriers to work.

- **Work Requirements** – policies that clearly clarify the expectation that all non-elderly non-disabled residents are expected to work.

The following is a preliminary outline of the proposed policy changes in each of these areas:

Financial Incentives and Asset Growth
CHA plans to modify the formula for calculating families' rent obligation to provide a strong financial incentive for residents to increase their earnings. The new formula will allow all residents to build assets as their earnings grow. It also will ensure that rent levels remain affordable at all times, while nevertheless preparing residents to afford market rents as their incomes grow.

The new rent policy will work as follows:

1. **Continued Income-Based Rents**. As is the case in the current system, families will pay 30 percent of their adjusted income for rent (or the minimum rent, whichever is higher).

2. **Earn Thousands of Dollars in Additional Savings by Increasing Earnings Beyond the Incentive Point**. Residents can look forward to a time when ALL increased rent due to increased earnings will be credited toward their Incentives Account. That time begins when a resident's reported earnings from work reaches the **higher** of the following:

    a. $13,000 year total income (the total income must include earned income) or

    b. An earnings level that is 20 percent higher than it was when the program was initiated (or the family entered subsidized housing, if later)

    This is the Incentive Point.

3. **Three-Year Incentives Period**. Once a resident's earnings reach the Incentive Point, the resident has three years in which to build assets based on increased earnings. During this three-year period, residents can build virtually unlimited assets in their Incentive Accounts by increasing their earnings above the Incentives Point.

    The credit to the Incentives Account is calculated as 30 percent of the difference between (a) their current reported earnings from work and (b) the reported earnings from work when the total income reached the Incentive Point.

4. **Minimum Rents.** Minimum rent will have a stepped increase to $50 effective April 1, 2009, $75 effective April 1, 2010 and $100 effective April 1, 2011.

5. **Ceiling Rents and Maximum Escrow Accrual**. During the three-year incentives period, the total tenant payment is capped at a ceiling rent determined by bedroom size. Because credits to the Incentives Account are based on rent paid by the resident, this cap also creates a maximum amount of

monthly credit to the Incentives Account. The maximum monthly credit to a resident's Incentives Account equals the ceiling rent less the rent they were paying at the time they hit the Incentive Point.

6. **Disbursing Incentive Accounts**. Residents can access their Incentive Accounts for any reason once they leave subsidized housing. While they remain in subsidized housing; however, account access will be limited to amounts needed to help residents overcome specific verifiable barriers to work. An example is for repairs to or purchase of a car needed to get to work.

7. **End of the Incentives Period**. Once the three-year Incentives Period is over, residents do not build any additional escrow. However, they may continue to live in subsidized housing until they are ready to move on. Residents will be encouraged to move upon completion of escrow period or when 40% of AMI is attained. If resident moves within 2 years of completion they will be entitled to full account, between 2-3 years only 80%, between 3-4 years only 60% and so on.

8. **Marketing the Message that Work Pays**. CHA plans to conduct substantial and sustained outreach to residents to help them understand how it pays to go to work under the new system.

Work Supports

CHA recognizes that many residents will need help finding a job and preparing for work. While CHA does not have funding to provide these services directly, CHA is committed to actively pursuing partnerships with other agencies to help ensure that residents have access to services that can help meet residents' needs. Among other services that CHA anticipates would be valuable, if service providers can be found to provide and pay for them, are the following:

- Employment services – barrier assessments, job search, resume writing, job coaching, etc.
- Case management / Service Coordination
- Short-term vocational training
- GED and ESL services
- Community College
- Child care and transportation subsidies
- Drug and alcohol rehab
- Mental health counseling
- Group Support Sessions

Work Requirements

CHA believes it is essential to create a clear expectation that all residents who are non-elderly and non-disabled should work. To this end, CHA plans to institute a work requirement under which the head of household will be expected to work full-

time by April 1, 2011. Full-time work is defined as a job for 30 hours or more per week.

When the program is launched, all non-working residents (except the elderly and persons with disabilities that prevent work) will undergo an assessment to determine the extent of any barriers to work. Clients who are prepared for work will be urged to look for work. Clients who are not prepared will be assigned other work participation activities to help them prepare for work, including life skills education and short-term vocational training.

During the first year of the policy (April 1, 2009-March 31, 2010), no residents will be sanctioned for failure to comply with the policy. This will give residents time to address barriers to work and better understand the policy.

After the initial introductory year has passed, head of households will be expected to exhibit a good-faith effort to find work for a minimum of 15 hours a week and/or participate in other work participation activities, if determined to be appropriate by the case manager. Each additional adult household member will increase the hours of work required by 5 hours/week. (i.e. 3 adult members would be 15+5+5=25 hours per week).

At the beginning of year three (April 1, 2011) the final phase of the work requirement will begin requiring the head of household to work full time (at least 30 hours /week). Each additional adult household member will increase the number of work hours required by 10 hours/week)

Clients who are still participating in job readiness activities such as life skills education or job training, or are still looking for work, after the end of the one-year introductory period, will be able to continue those alternative work participation activities. However, those activities will count toward the work participation requirements for only a total of 12 months over the lifetime of the resident's stay in subsidized housing. (The introductory year does not count toward this limit.) Residents will be urged to save some or all of their 12-month period of permitted alternative work participation activities to cover a future unexpected loss of work.

Clients who fail to comply with the work requirements policy will be sanctioned. The sanctions will be progressive, increasing in magnitude the longer a client is in non-compliance. Residents/Participants who fail to reach the 4/1/2010 and/or 4/1/2011 milestones or have a loss of 15 hours or more of employment may receive up to two (2) counseling sessions within a maximum grace period of 90 days to obtain mandatory employment or re-employment. If the resident/participant has failed to obtain the required number of hours of employment at the end of the grace period, he/she will be considered in non-compliance with subsidy requirements and the initial sanction will include a 50% loss of subsidy for up to 3 months. If the non-

compliance is not corrected, or repeated within 12 months, the final sanction will be 100% loss of subsidy causing residents to pay the established market rent. The resident cures the non-compliance with 6 months of 100% loss of subsidy, re-entrance to the program can be granted. However, the time the resident was absent from the program will not be excluded and the graduation will remain as originally anticipated. After re-admittance, any further non-compliance will cause 100% loss of subsidy, incentive account forfeiture and in public housing, lease termination.

Hardships:

Hardship Exemption for Minimum Rent:
Clients may be granted a three (3) month short-term minimum rent hardship exemption. At the end of the exemption, repayment of the excluded rental funds must be paid back to the housing authority on either a month-to-month basis or in full.

Hardship Exemption for Work Requirement:
Clients will be granted either a three (3) month short-term or six (6) month long-term work requirement exemption. Any work requirement hardship that exceeds six (6) months must be approved by the housing authority. Clients will be expected to participate in volunteer work with community agencies during any approved hardship period.

Hardship Exemption for Increased Rent:
Clients may request a hardship exemption based on an extraordinary cost of living. The hardship exemption may be considered if the total costs after deductions combined with unreimbursed medical or childcare costs, exceeds 50% of the household's monthly income.

Total costs are defined as rent and utilities.

Persons with disabilities have the right to request Reasonable Accommodations.

Hardship Exemption Requests:
All requests for hardship must be received by the Property Manager or Housing Specialist within thirty (30) calendar days of the date of the rent adjustment notification or hardship event whichever occurs first. The responsible household member will need to complete a Hardship Application form and if necessary a Reasonable Accommodation Form and provide documentation to prove eligibility. Upon receipt of these forms, the information will be processed and forwarded to the Reasonable Accommodation Committee and Management for approval.

Statutory Objective
The Rent Reform and Work Requirement Initiatives promote work by requiring it for program compliance. It also allows expanded housing choice by requiring work which will hopefully increase the household income making more housing choices available.

Anticipated Impact
CHA plans to modify the formula for calculating families' rent obligation to provide a strong financial incentive for residents to increase their earnings. The new formula will allow all residents to build assets as their earnings grow. It also will ensure that rent levels remain affordable at all times, while nevertheless preparing residents to afford market rents as their incomes grow.

An incentivized work requirement will provide an increase in household income. The availability of life skill and work support programs to be delivered by community partners will promote household stabilization and participants will be able to develop a defined goal towards self-reliance.

Baselines and Benchmarks
The Baselines for this initiative were established October 1, 2008.
1. The current median earned income is $13,260.
2. The number of members with earned income is 1,980.
3. The number of households paying minimum rent is 1,486.

The benchmarks are charted below were determined based on the average rate of inflation and cost of living. The benchmarks for number of working households and number of minimum rent households will be reevaluated in Year 5.

	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Increase in earned wages	2.5%	2.5%	2.5%	2.5%	2.5%
Increase in number of working households	10%	30%	50%	60%	60%
Decrease in number of minimum rent households	10%	30%	50%	75%	75%

Data Collection and Metrics
Through PH Yardi Software, annual recertification process and supportive service providers, staff will collect:

- life skill, work support and educational program participation
- earned wages and percent change
- hours worked

Data will be reported annually. CHA will analyze statistics every 6 months, but residents are not required to report increased income except annually (unless they are on minimum rent) would be annually during recertification.

Authorizations
Attachment C: Authorizations Related to Public Housing Only
C4. Initial, Annual and Interim Income Review Process. The Agency is authorized to restructure the initial, annual and interim review process in the public housing program in order to affect the frequency of the reviews and the methods and process used to establish the integrity of the income information provided. In addition, the Agency is expressly authorized to adopt a local system of income verification in lieu of the current HUD system. *This authorization waives certain provisions of sections 3(a) (1) and 3(a) (2) of the 1937 Act and 24 C.F.R. 966.4 and 960.257, as necessary to implement the Agency's Annual MTW Plan.*

C5. The Agency is authorized to modify current public housing occupancy policies to use housing as an incentive for making economic progress, as long as Section II.C. of the MTW Agreement is adhered to. Such modifications may include revising maximum income limits for admission or continued occupancy. This authorization waives certain provisions of Section 6(c) of the 1937 Act and 24 C.F.R. 960.201, as necessary to implement the Agency's Annual MTW Plan.

C11. The agency is authorized to determine family payment, including the total tenant payment, the minimum rent, utility reimbursements and tenant rent. The Agency is authorized to adopt and implement any reasonable policies for setting rents in public housing including but not limited to establishing definitions of income and adjusted income, or earned income disallowance that differ from those in current statutes or regulations. The Agency is authorized to adopt and implement term limits for its public housing assistance. Such policies must include provisions for addressing hardship cases. This authorization waives certain provisions of Section 3 (a)(2), 3(a)(3)(A) and Section 6(l) of the 1937 Act and 24 C.F.R. 5.603, 5.611, 5.628, 5.630, 5.632, 5.634 and 960.255 and 966 Subpart A as necessary to implement the Agency's Annual MTW Plan.

Attachment C: Authorizations Related to Section 8 Only
D.2.a. The Agency is authorized to adopt and implement any reasonable policy to establish payment standards, rents or subsidy levels for tenant-based assistance that differ from the currently mandated program requirements in the 1937 Act and

its implementing regulations. The Agency is authorized to adopt and implement any reasonable policies to calculate the tenant portion of the rent that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations. This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to implement the Agency's Annual MTW Plan.

Attachment C: Authorizations Related to Family Self Sufficiency
E. The Agency is authorized to operate any of its existing self-sufficiency and training programs, including its Family Self-Sufficiency (FSS) Program and any successor programs exempt from certain HUD program requirements. These may include those requirements governing program size or participation, including whether to establish escrow accounts and other rent incentives and whether to establish mandatory self-sufficiency participation requirements. If the Agency received dedicated funding for an FSS coordinator, such funds must be used to employ a self-sufficiency coordinator. In developing and operating such programs, the Agency is authorized to establish strategic relationships and partnerships with local private and public agencies and service providers to leverage expertise and funding. However, notwithstanding the above, any funds granted pursuant to a completion must be used in accordance with the NOFA and the approved application and work plan. This authorization waives certain provisions of Section 23 of the 1937 Act and 24 C.F.R. 984 as necessary to implement the Agency's Annual MTW Plan.

A2. Create CHA Standardized Form

The Charlotte Housing Authority would like to revise HUD Form 52646 (Housing Choice Voucher) to allow for more than one extension approval and to incorporate a mandated "Good Neighbors" Training. Currently, the form design allows only one space for an extension. HUD regulation 982.303 states that PHAs may at its discretion develop policy that allows one or more extension of the initial voucher term. The form will need to be revised to allow CHA Section 8 staff to record more than one extension of the voucher to coincide with the CHA Section 8 Administrative Plan.

The use of the HUD Form 52646 is currently addressed in Chapters 8 and 13 of the CHA Administrative Plan as approved March 18, 2008. The current policy states "Extensions may be granted for a period of 30 days, not to exceed a total of 60". This implies that at least two extensions may be granted and the form is not designed to accommodate this. We will propose new language similar to the following "Extensions may be granted for a period of 30 days, not to exceed a total of 90". This will allow for a total period of 180 days on the HUD Form 52646.

Statutory Objective
The proposed MTW initiative is related to the statutory objective to *"reduce cost and achieve greater cost effectiveness in Federal expenditures"*, because it will result in improved administrative efficiencies by making the HUD Form 52646 more user friendly for both the participant and the CHA Section 8 Department staff.

Anticipated Impact
The impact that the proposed initiative will have is to remove the confusion experienced by both the Section 8 participants and CHA Section 8 staff surrounding the use of this form. Presently, staff records one extension date in the allowed space, but the form does not allow space to record the staff name that authorized the extension. If the family requires another extension staff initials over the existing date and records a new date over the existing date. Revision of the form will reduce the confusion surrounding its use and will eliminate staff's continued requests to address the issue. It will also allow CHA the ability to incorporate additional family obligations such as mandating attendance of programs like the Good Neighbor Training as a requirement for receipt of a CHA Section 8 Voucher.

Baseline and Benchmark
The baseline is the non existence of a form that complies with HUD guidelines. The benchmark would be the revised, conforming document. We propose to have this form and associated section in the CHA Administrative Plan revised by March 2010.

ADMINISTRATIVE PLAN CHANGES:

Draft proposed revisions to the CHA Administrative Plan	February 2009
CHA Administrative Plan revisions for public comment	February 2009
CHA Administrative Plan revisions for Board approval	April 2009

HUD FORM 52646:

Draft revisions to HUD Form 52646 and submit for approval	February 2009
Implement revised HUD form 52646	April 2009

Data collection and Metrics
The ease of use of the revised HUD Form 52646 will be measured. The revised form will be utilized during a 30-day trial period during April 2009. Staff and Section 8 participants requesting an extension during the month of April will be asked to provide feedback on the use of the form to determine if the revisions made to the form are more user-friendly. The results of the feedback received will be shared with management in the Operations Department for discussion. If favorable feedback is received, the form will be released for use by staff.

A survey form will be developed to track, record and report on the results of the feedback received during the test period. The results will be submitted by July 2009.

Authorization
The agency will use the flexibility in Attachment C, D.1.b. "The agency is authorized to determine the length of the lease period, when vouchers expire and when vouchers will be reissued." Specifically, 982.303, (b) (2) of the Code of Federal Regulations and 1937 Housing Act.

A3. Resident Safety Initiative

The purpose of the Resident Safety Department is to provide a safe and stable environment for residents. Through crime prevention initiatives, lease enforcement procedures and increased communication, CHA has improved relationships with both residents and the Charlotte Mecklenburg Police Department. Strengthening these efforts will assist in maintaining and enhancing ongoing initiatives in the communities, as well as enhancing our portfolio. The Resident Safety Department proposes to expand the types of crime prevention initiatives and program enforcement initiatives for both CHA public housing sites and Section 8 properties. Resident Safety has developed a Crime Prevention Strategic Plan to address crime and crime prevention activities at the Charlotte Housing Authority's public housing sites. The ability to access data faster and more frequently allows CHA to apply the appropriate amount and type of resources in a particular community.
The strategies to be implemented represent a comprehensive effort to decrease the actual crime incidents and public perception of an unsafe environment in the CHA communities. The following activities will be implemented in FY 2009 – 2010 to assist in the success of Charlotte's other MTW Plan activities such as site based waiting lists, work requirement, and production partnership with Charlotte Mecklenburg Schools. The proposed activities are:

- Private Security and Security System Upgrades for the High Rise Sites;
- Off Duty Charlotte Mecklenburg Police Department (CMPD) Officers for Family/Cluster Sites;
- Crime Statistics Analyst; and
- Specialized Research Software.

The keys to the success of the plan are CMPD and the Charlotte Fire Department (CFD) to encourage resident involvement in crime prevention and safety at all properties.

Statutory Objectives and Anticipated Impact
This initiative seeks to provide a safe and stable community. This initiative positively impacts families by meeting both the statutory objective to expand their housing choices and promote work and self sufficiency. The safety and well-being of their children is one of the primary concerns for families when choosing a housing

location. In addition, feeling secure about their perspective community gives them one less issue to worry about as they focus on becoming gainfully employed. Changing the perception of our community environments will have a positive impact on the surrounding community (schools and local business).

The initiative also improves the social and physical value of the CHA properties which will result in administrative cost savings and efficiencies.

Baselines and Benchmarks
We will be measuring the reduction of crime incident statistics for all CHA Sites combined. There were 965 crimes within CHA properties in 2007. This baseline was established based on crime statistics provided by Charlotte-Mecklenburg Police Department. The benchmark is to reduce crime within CHA properties by 5% each fiscal year for 5 years.

Data Collection and Metrics
CHA will work with the Charlotte Mecklenburg Police Department (CMPD) to collect all reported incidents of each CHA's community from the CMPD Research Analysis Division and conduct a comparison from the previous fiscal year.

Authorization
Attachment C – B.1.b.v. The provision of safety, security, and law enforcement measures and activities appropriate to protect residents of housing from crime.

ONGOING MTW ACTIVITIES: HUD APPROVAL PREVIOUSLY GRANTED

ONGOING MTW ACTIVITIES: HUD APPROVAL PREVIOUSLY GRANTED

The following are ongoing initiatives that have been previously approved by HUD for implementation. This section provides an update on the status of those activities. The updates are more recent than those found in the 2007 – 2008 MTW Annual Report. Some of the initiatives have been implemented and are considered complete, while others may modify their benchmarks as the years progress.

OPERATIONS

B1. Establish Site-Based Waiting Lists for Project Based Section 8 and Public Housing units

CHA established site based waiting lists for Public Housing in May 2008 and Project Based Section 8 in June 2008. This allows applicants to choose developments they want to reside and apply on site. Management of the waiting lists is done at the site-level. Applicants for Project-Based Section 8 units sign up at the property level for housing units. Project Based Section 8 applicants do not come from the Authority's master Section 8 waiting list.

Statutory Objective

This will increase housing choices for low-income families. Allowing participants the freedom to choose where they want to live allows them to sign-up to live in a community that is geographically located to their desired employers thus removing potential transportation barriers.

Anticipated Impact

The change to site based waiting list allows the applicants additional housing choices and decreased wait time on the centralized wait list.

Baselines and Benchmarks

This will affect the 2,121 members on the Public Housing waiting list and the 3,618 on the Section 8 waiting list. The implementation timeline was met as proposed. Full benchmarks are to be developed during the 2008-2009 fiscal year. CHA initially anticipated a decrease in the time/process required to obtain housing by 5%; however, it was realized that persons on the public housing waiting list could wait as long, if not longer than before CHA transitioned to site based waiting lists. As a result, the tracking the time required to obtain housing has been eliminated. The present benchmark is to expand the housing choices of persons on the waiting lists. Residents are allowed to place their names on as many waiting lists as they like and are given 3 choices for their name to come up. If they do not accept the housing offered after the third choice, they are taken off the list or sent to the bottom of the lists, as opposed to one offer when they were on the centralized waiting lists.

Data Collection and Metrics
This target has been implemented and staff is now tracking the number of participants who accept first offer and average time on the wait list. CHA's software system will track site base waiting list for Section 9 units. CHA will work with local landlords and Socialserve.com to establish tracking of site based waiting list for Section 8.

Authorizations
Attachment C: Section C. Authorizations Related to Public Housing Only Site Based or Geographic Area Waiting List System The Agency is authorized to implement a locally designed waiting list system that provides applicants with a reasonable choice of location in accordance with title VI of the Civil Rights Act, the Fair Housing Act, and other applicable civil rights requirements, but in lieu of the specific procedural requirements of 24 C.F.R. Part 903. The Agency may implement additional site-based waiting lists under this MTW Agreement. *This authorization waives certain provisions of Section 6(r) of the 1937 Act and 24 C.F.R. 903.7 as necessary to implement the Agency's Annual MTW Plan.*

Attachment C: Section D. Authorizations Related to Section 8 Section 8s Only, 4. Waiting List Policies. The Agency is authorized to determine waiting list procedures, tenant selection procedures and criteria and preferences, including authorizing vouchers for relocation of witnesses and victims of crime. *This authorization waives certain provisions of Sections 8(o)(6), 8(o)(13)(J) and 8(o)(16) of the 1937 Act and 24 C.F.R. 982 Subpart E, 982.305 and 983 Subpart F as necessary to implement the Agency's Annual MTW Plan.*

B2. Alternate Review Process

CHA proposes to develop alternate sources and time frames for the validity of verification information, include requirement of resident to report progress on initiatives they are participating in and provide an update of family needs assessment. Also, CHA proposes to conduct criminal background checks at recertification.

Statutory Objective
There will be a reduced cost and CHA will achieve greater cost effectiveness in Federal expenditures by extending the timeframe and type of program information needed during the recertification process.

Anticipated Impact
There will be a greater opportunity that the verified data will be considered valid and this will eliminate the need to update the information every 90 days.

Baselines and Benchmarks
This initiative will affect all elderly and disabled applicants. The baseline is set between 2,000 – 2,200 elderly and disabled public housing and Section 8 persons. The benchmark is set at a reduction of 1,000 recertifications per year. Organizational cost savings will be reported on after the first year. CHA proposes that elderly residents will have annual recertifications reduced from annually to bi-annually beginning in April 2009.

Data Collection and Metrics
CHA's software system will be utilized to determine the number of Section 9 recertifications completed without alternate system. All documentation needed for initial and annual have been combined into one file for managers to issue. All re-certifications are now completed by the property staff.

Authorizations
Attachment C: C. Authorizations Related to Public Housing Only, 4. Initial, Annual and Interim Income Review Process. The Agency is authorized to restructure the initial, annual and interim review process in the public housing program in order to affect the frequency of the reviews and the methods and process used to establish the integrity of the income information provided. In addition, the Agency is expressly authorized to adopt a local system of income verification in lieu of the current HUD system. *This authorization waives certain provisions of sections 3(a) (1) and 3(a) (2) of the 1937 Act and 24 C.F.R. 966.4 and 960.257, as necessary to implement the Agency's Annual MTW Plan.*

SECTION 8

C1. Section 8 Property Rating System

The Section 8 Property Rating System was implemented to increase the housing quality standards of property owners participating in the Section 8 program. CHA has contracted with a local engineering firm, Professional Service Industries (PSI) to develop a quantitative evaluation rating system for the exterior appearance of a property using the City of Charlotte Code Enforcement Standards and U. S. Department of Housing and Urban Development Housing Quality Standards (HQS). The firm began exterior inspections of CHA Section 8 properties in December 2007, thus far completing over 832 inspections which includes an inspection of the exterior of the structure, landscaping, foundation, sidewalk and driveway. A sample of all properties of approximately 1,600 landlords will be inspected.
CHA has a system in place to ensure there are no serious problems with unit interiors. CHA has not eliminated or decreased interior inspections of Section 8 properties. HQS inspections continue to be conducted on the interior prior to voucher issuance, during the recertification period and if there are any participant complaints during the lease period. Re-inspections are completed after any failed

inspections. The intent of the external inspections is to establish a system that provides a greater level of monitoring and enforcement for problem landlords.

Statutory Objective

The Section 8 Property Rating System relates to the expansion of housing choices for low-income families and individuals. By continuously establishing a quantitative evaluation rating system for the exterior appearance of a property participating in the Section 8 program, landlords interested in participating or continue to participate in the Section 8 program will be required to ensure that the exterior of the structure meets and continues to meet increased housing quality standards. Failure to do so will result in the unit potentially not being housing of choice for our low-income families. The more stringent housing quality standards are anticipated to improve the appearance and conditions of the properties and provide more housing opportunities.

Anticipated Impact

CHA is gathering data on the exterior inspections and will begin to incorporate a more stringent exterior inspection into the CHA HQS inspection process. CHA is in the process of revising the inspection checklist that incorporates the exterior inspection items. The exterior items, and a select number of interior items, will be rated and scored. The exterior items will be weighted so as to ensure that units in the CHA Section 8 program are equal to or greater in appearance compared to other units in the community. CHA will create a database to capture, track and report on the results of the exterior inspections conducted by our contractor. A rating of A- F is assigned to each property inspected based on a total score of between 0-29 points. The database will allow CHA to quickly determine the average rating and/or score for those units inspected. This database will enable CHA to determine if our existing housing stock is at or below a CHA determined rating and/or score and use this information to determine if corrective actions are needed.

Baselines and Benchmarks

The baseline is zero (0) since CHA was not using PSI to conduct exterior inspections. The benchmark was set at 200 evaluations per quarter, with a target of 800 inspections by March 31, 2009. As of December 2008, 832 inspections have been completed. PSI is averaging 277 inspections per quarter, which exceeds the 200 per quarter benchmark. The goal is to encourage landlords to maintain all properties such that the property receives a rating of C or better.

Data Collection Process

CHA has not implemented a database to track the impact of this initiative. CHA measures the activity and its capacity to achieve the related statutory objectives by reviewing the results of the reports that PSI provides to the agency. A full analysis of the data base on location and property exterior condition is expected by March

2009 after a full implementation year and sufficient time to fully analyze the data based on location and condition of property exterior.

Authorizations
Attachment C, Section D5: The Agency is authorized to certify that housing assisted under MTW will meet housing quality standards established or approved by HUD. This authorization waives certain provisions of Section 8 (o) (8) E of the 1937 Act and 24 C.F.R. Part 982, Subpart I, § 982.405 as necessary to implement the Agency's Annual MTW Plan. This waiver is necessary to achieve the benchmark because it will result in a tool that CHA staff can use to evaluate properties to ensure that housing under the Section 8 program is maintained at a determined quality standard; thereby, increasing the number of quality housing choices for low-income families. It is noted that CHA has higher standards than traditional federal HQS.

C2. Participant and Landlord Tracking Program (Increase Fair Market Rents)
The Charlotte Housing Authority partnered with the University of North Carolina at Charlotte (UNC Charlotte) to use Geographic Information Science (GIS) mapping to identify each voucher holder within Mecklenburg County. The purpose was to analyze the census tracts with a large number of Section 8 voucher holders. CHA intended to de-concentrate poverty by determining the current housing cost in non-concentrated census tracts and identify available affordable housing opportunities. Analysis of the data will be conducted to determine the need to increase fair market rents in specific census tracts.

Statutory Objective
The Participant and Landlord Tracking system will assist in increasing housing choices for low-income families. Analysis of non-concentrated census tracts will help determine current housing cost and available affordable housing opportunities in non-concentrated areas. CHA expects that the fair market rents in these areas must be raised to 120% to attract more landlords in non-concentrated census tracts.

Anticipated Impact
The impact has not yet been determined because there has not been enough data compiled to fully assess the market conditions in the areas of non concentration. Charlotte Housing Authority anticipates an increase in the number of housing opportunities for low-income participants near higher rental areas within the county limits. This will aid in reducing the concentration of low-income families in one particular census tract in Charlotte.

Baselines and Benchmarks
Sufficient data has not been gathered to document the baseline or evaluate any benchmarks. Quarterly reports are being complied to assess the market conditions. Preliminarily, based on the mapping results, CHA has determined that more than 120% FMR will be needed in order to serve higher income areas of the county.

Data Collection
The original baseline was to begin the voucher clustering process by December 2007. The contract for the service was executed in November 2007 and the database collection began in December 2007. The data is being compiled on a quarterly basis. In order to assess the conditions, the results of the annual data will be reviewed in the first quarter of 2009 to make recommendations of specific Neighborhood Statistical Area's (NSA) that may have an impact on decentralizing low income families.

Authorizations
The authorization which gives CHA the flexibility to establish payment standards between 90 percent of fair market rental (FMR) and 120 percent of FMR by census tract instead of HUD established FMR jurisdiction for the Participant and Landlord Tracking Program is 42 U.S.C 1437f(o)(1)(B) and corresponding regulations at 24 C.F.R. § 982.503 (c) (2). The waiver is necessary to achieve the benchmark because it reduces the concentration of vouchers in certain census tracts in Charlotte, increases housing choices for low-income families.

C3. Affordable Housing Impact Studies

CHA commissioned University of North Carolina at Charlotte (UNCC) to design a research program to examine the affordable housing impact on neighboring property owners and the surrounding community. The local social and economic data and geographic information science (GIS) technology was used to create the framework for examining the pattern and density of affordable housing and measure the association between this housing stock and crime rates, housing and property values, and school equity in surrounding residential communities.

The Affordable Housing Impact Studies initiative is primarily complete. UNC Charlotte utilized the most recent property values data, including sales information from the Mecklenburg County Property Tax Office, crime statistics from the Charlotte-Mecklenburg Police Department, and Charlotte-Mecklenburg Schools achievement data. The final study results were presented to the Charlotte Housing Authority Board of Commissioners in June 2008.

The Charlotte Housing Authority now faces an issue with using the mapping to make a decision on affordability throughout the Charlotte-Mecklenburg area since some of the areas in the City of Charlotte's HouseCharlotte geography will not be affordable even up to 120% of FMR. The City of Charlotte's HouseCharlotte geography identifies threatening, transitioning and selected stable neighborhoods based on a Quality of Life Index Report. The program considers areas with up to 110% of the area median income as requiring assistance.

Statutory Objective
The Affordable Housing Impact Studies is related to the statutory objective to expand housing choices for low-income families and individuals. In Charlotte, Section 8 participants have historically been concentrated in high poverty neighborhoods. This initiative enhances the availability of affordable housing in existing residential communities with lower-poverty, where a higher quality of life exists and opportunities to escape poverty are greater.

Anticipated Impact
By analyzing this data, low-income families will be afforded the opportunity to have information that will aid in making decisions about desired areas that are impacted in the community. This should yield increased housing choices by families.

Baselines and Benchmarks
The baseline for this initiative is set at zero (0). The benchmark was the receipt of three final reports: 1) Section 8 Households and the Relationship to Crime in Charlotte, NC 2) Section 8 Households and the Relationship to Property Values in Charlotte, NC 3) School Quality and Affordable Housing in Charlotte, NC: A Spatial Assessment. The final presentations on the study results were presented to the Charlotte Housing Authority Board of Commissioners in June 2008.

Cumulatively reported, it was stated that overall, the crime data indicated that there was little evidence to support the perception that Section 8 households impact the property crime rates in surrounding neighborhoods. Furthermore, there was weak evidence that Section 8 households impact property values. It was noted that property values are influenced by multiple factors (property location, housing unit characteristics, neighborhood demographics, foreclosures, and neighborhood change). However, the overall impact is less than other neighborhood characteristics, homeownership, foreclosure, age of housing and proximity to center city. Findings from the school equity data indicate that increased property values and declining proportions of affordable housing stock have reduced the access to better quality neighborhood schools.

CHA has been able to use these findings to support opposition to the Section 8 program participants in Charlotte communities. These findings have been recited to the Charlotte-Mecklenburg Chief of Police, Charlotte City Council and Neighborhood Associates.

Data Collection
The source of crime data included: Section 8 single family households, point locations of property crimes, Mecklenburg County property records, and Charlotte Neighborhood Quality of Life Data.

The source of property values data included: residential property sales, detailed residential characteristics for the sales data, Section 8 household change located a quarter mile from a property sale, and Charlotte Neighborhood Quality of Life Data.

The source of the school equity data included: Mecklenburg County property records, Charlotte-Mecklenburg School student assignment, US Census Tract boundaries, and Claritas Popfacts.

Authorizations

The authorization which gives CHA the flexibility to establish payment standards between 90 percent of fair market rental (FMR) and 120 percent of 120 FMR by census tract instead of HUD established FMR jurisdiction for the Affordable Housing Program Studies is 42 U.S.C 1437f(o)(1)(B) and corresponding regulations at 24 C.F.R. § 982.503 (c) (2). The waiver is necessary to achieve the benchmark because it reduces the concentration of vouchers in certain census tracts in Charlotte, increases housing choices for low-income families.

C4. Section 8 Training

CHA is working with Central Piedmont Community College (CPCC) to offer a "Good Neighbors" training to all applicants entering the program as a result of being pulled from the waiting list. The training is a component of the briefing that all participants must attend prior to the issuance of a Section 8 voucher. The training is designed to assist families in their acclimation into a neighborhood. Participants learn more about being a "Good Neighbor" by focusing on topic such as building codes and standards, property maintenance, basic zoning regulations, home maintenance and conflict resolution. In April 2009, CHA will mandate this training for all incoming portable participants, all applicants selected from the CHA waiting list and all existing participants.

Statutory Objective

The Section 8 training program is related to the statutory objective to expand housing choices for low-income families and individuals. The issuance of a voucher will enable the participants to seek affordable housing. CHA hopes that by providing this training to all participants, the community will curb their criticism of the program and realize that CHA is taking a progressive approach to assisting the CHA participant families with their transition into various neighborhoods throughout Charlotte.

Anticipated Impact

There are no early indications that the initiative has had an impact on the statutory objective. While most of the participants are resistant upon receiving notification, after attending the class they indicated the training information was useful.

Baselines and Benchmarks
The baseline for the initiative is zero (0). The established benchmark is to train at least 300 families by January 2009. As of December 2008, a total of 549 Section 8 participants have been trained. Sessions are provided twice a month. Portables and those selected from the CHA wait list will be mandated to attend training before a voucher is issued. Based on the current number of families that have participated in the Good Neighbor Training, CHA has well exceeded the benchmark goal. Beginning April 2009, all participating Section 8 families will be required to participate. The new benchmark will be 1,080 participants.

Data Collection
CHA is maintaining a record of all participants that complete the training. Attendance is taken at each session. A database is being established to cross reference the participants that complete the training with the Resident Safety programs list of participants with incident reports, complaints or violations to measure the effectiveness of the training program.

Authorizations
The authorizations which gives CHA the flexibility to utilize excess HAP funding to fund mandatory training for all Section 8 participants is 1437g(d)(1)(H) and corresponding regulations at 24 C.F.R. § 982.154 and § 982.157 (b) (ii). This waiver is essential to achieving the benchmark because the activity assists families in their transition to various neighborhoods throughout Charlotte and curbs criticism of the program.

C5. Assess Section 8 Program Participants

CHA partnered with Central Piedmont Community College's (CPCC) Center for Applied Research to assess the needs of the Section 8 participants. The surveys were mailed to each household in June 2008. The assessment is a key planning component to determine the types of services and programs families will need to assist them in becoming self-sufficient and develop work plans for each family to address self-sufficiency needs. The assessments will measure the families' capacity to live independent of a housing subsidy. CHA will partner with local service providers to create locally designed programs, services and policies to address the target population deficiencies.

Statutory Objective
By assessing the needs of the families CHA will have the data needed to develop targeted programs, services and policies that will aid families in their quest to become self-sufficient.

Anticipated Impact
The assessment will yield individual work plans for families. CHA will provide incentives to families with children where the head of household is working, is

seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient. Determining the type of services, barriers to achieve self-sufficiency and the needs of the families is a key element of the MTW program.

Baselines and Benchmarks

The baseline is currently zero (0). This is an initial assessment. CHA has 4,260 authorized Section 8 vouchers (HCV) of which CHA initially planned to survey 3,425 program participants or 80%. The benchmark and performance measurement is to achieve at least 80% participation in the assessment by December 2008.

There were 4,260 Section 8 vouchers authorized during the FY 2008-2009 MTW Annual Plan process. The 3,425 or 80% calculation was based on this number. The 128 Project-Based Section 8 families and 525 seniors/disabled were removed from the survey resulting in a total of 3,607 participants. CHA has adjusted the 80% number to reflect the deducted households, bringing the benchmark to 2,886. As of December 2008, 3,294 or 91% of the participants have responded to the survey either online or through mail. Therefore, CHA has exceeded the benchmark of 80%.

Data Collection and Metrics

An initial letter and survey were mailed in June 2008 to all Section 8 households. A reminder post card was mailed the first and third week of August 2008. The survey consisted of 46 questions. Surveys were completed online and via mail. The survey purpose was to evaluate their capacity for independent living. Survey focus areas were: Employment and Education, Family Responsibilities, Health, and Elderly and Disabled Residents. Final analysis of the survey responses will be presented by CPCC in November 2008. Preliminary results indicate that the Section 8 participants primary needs are transportation, childcare and more education/training. The results of the survey will allow CHA to connect them with the services necessary to facilitate their progress toward that goal.

Authorizations

Attachment C: Section E: Authorizations Related to Family Self Sufficiency - The Agency is authorized to operate any of its existing self-sufficiency and training programs, including its Family Self-Sufficiency (FSS) Program and any successor programs exempt from certain HUD program requirements. *This authorization waives certain provisions of Section 23 of the 1937 Act and 24 C.F.R. 984 as necessary to implement the Agency's Annual MTW Plan*

C6. Modify Section 8 Inspection Procedures

CHA proposed and received HUD approval to waive the requirement for an initial Housing Quality Standards (HQS) inspection on newly constructed Section 8 units (Project Based Section 8 units) and utilize local Building Standard's inspection and

subsequent issuance of a Certificate of Occupancy (CO) as a substitution of the initial or move-in inspection.

Statutory Objective
By utilizing the CO on new construction, the cost to CHA will be reduced because the County provides a complete building inspection to issue a CO. This will reduce cost and achieve greater cost effectiveness in Federal expenditures. Additionally, the new process will aid in housing low income families more timely.

Anticipated Impact
By utilizing the CO on new construction, the cost to CHA will be reduced because the County provides a complete building inspection to issue a CO. Additionally, the new process will aid in housing low income families more timely.

Baselines and Benchmarks
Utilizing an additional inspection adds approximately three days to the move-in process. CHA anticipates achieving a 10% decrease in time between issuance of voucher and customer housed and a cost saving for each unit that is not inspected by a third party upon initial occupancy of a newly constructed development. CHA benchmark for the fiscal year 2008-2009 is approximately 20 percent of the units. The target start date was April 2008; however, a separate proposal was submitted to HUD and was approved in July 2008. The Mecklenburg County Building Certificate of Occupancy was used on the 60 units at 940 Brevard which is 100% leased. Also, there were 13 units waived at Seigle Point Apartment Homes. By the end of lease up 18 units total will be waived at Seigle Point Apartment Homes. Live Oak Sr (SpringCroft at Ashley Park) is anticipated to begin leasing the third week in January. This development has 18 Project Based units that will be waived.

Data has not been tabulated for this initiative at the time of submission.

Data Collection and Metrics
In August 2008, the Section 8 staff began tracking the amount of time it takes to process a family for lease up from date of issuance of a request for tenancy approval (RFTA) to the effective date of the lease. We will begin reporting the results of our efforts during the third quarter. CHA's software will compute both the number of re-inspections and the timeliness of housed process. Modification of existing software may be required to include fields for inputting data that indicates the number of properties viewed and reason for rejection.

Authorizations
Attachment C: Section D. Authorizations Related to Section 8 Section 8s Only, 5. Ability to Certify Housing Quality Standards. The Agency is authorized to certify that housing assisted under MTW will meet housing quality standards established or approved by HUD. The certification form will be approved or provided by HUD. *This authorization waives certain provisions of Section 8(o) (8) of the 1937 Act and*

24 C.F.R. 982, Subpart I as necessary to implement the Agency's Annual MTW Plan.

C7. Amend Section 8 Housing Assistance Payment (HAP) Agreement

CHA proposes to require all landlords to provide property monitoring reports showing evidence of meeting standards to be developed by the Authority, revise inspection procedures, and include penalties for landlord non-compliance with neighborhood rating system or alternate inspection protocol. CHA will require all participants to report changes and/or progress on family goals when established and update family needs assessment as part of the recertification process and other modifications in the best interest of the participant and/or the Authority.

In the 2nd qtr of CHA's FY 2008 – 2009, the process for processing and tracking preparation of the HAP contract was documented. CHA will evaluate this process for minimum of (60) days to determine the effectiveness of the process. If the process proves effective CHA will establish a system whereby most of the paperwork needed for processing a new HAP contract can be automated. CHA plans to accomplish this by placing all HAP contract related documents on the CHA website in PDF format and establish a dedicated email address so that landlords will be able to complete the required forms and email to the dedicated address. For documents that require a signature, landlords will be able to scan the signed document and email it.

Statutory Objective

New community quality housing standards should increase the choices for participants since landlords will have stricter requirements to ensure properties meet standard. In addition, by requiring owners to provide their own monitoring reports and assessing penalties for non compliance CHA's cost incurred for re-inspections will be reduced.

Anticipated Impact

The initiative is intended to improve the quality of housing in the community, as well as reduce community resistance to Section 8 units.

Baselines and Benchmarks

The new HAP agreement has not been finalized. The document is 20% complete. The HAP agreement is only associated with the units that CHA is inspecting as a new lease up (either as a new admission or a unit transfer). As such, we are only tracking those numbers as opposed to all inspections conducted. We average about 69 (new admission/unit transfer) inspections per month. Our baseline is 39% (failed inspections for new admission/unit transfer).

Benchmarks are to be developed during 2008-2009 planning year but anticipated to include reduction of failed inspections for community standards by 10%, streamlining the HAP agreement for efficient operations, and automating the HAP

contractual process. The revision of the HAP agreement will be completed by April 2009.

Data Collection and Metrics
An internal group in Section 8 has been convened to review the Administrative Plan and HAP Agreement. CHA anticipates proposed policy changes to the Board of Commissioner in April 2009 for approval. Additionally, Section 8 staff is working on revising the HAP agreement and Form HUD 52580 (Inspection Checklist). Staff is developing written procedures for the inspections department and has also established a monthly landlord briefing session for new and existing landlords, working towards establishing a landlord and participant advisory committee, and streamlining the HAP contract process. Once all revised and new inspection notices and forms and procedures have been approved, Section 8 staff will meet with the CHA IT department for assistance with automating the documents via the existing software used.

CHA's software system will compute both the number of re-inspections and the timeliness of housed process. Separate software may be purchased and used to track the FSS needs of families and the needs, services and programs provided to families.

Authorizations
Attachment C: Section D. Authorizations Related to Section 8 Only, 5. Ability to Certify Housing Quality Standards. The Agency is authorized to certify that housing assisted under MTW will meet housing quality standards established or approved by HUD. The certification form will be approved or provided by HUD. *This authorization waives certain provisions of Section 8(o) (8) of the 1937 Act and 24 C.F.R. 982, Subpart I as necessary to implement the Agency's Annual MTW Plan.*

The Agency is authorized to determine the term and content of Housing Assistance Payment (HAP) contracts to owners during the term of the MTW demonstration. However, any revised HAP contract should include language noting that the funding for the contract is subject to the availability of Appropriations. *This authorization waives certain provisions of Section 8(o) (7) of the 1937 Act and 24 C.F.R. 982.162 as necessary to implement the Agency's Annual MTW Plan.*

The Agency is authorized to define, adopt and implement a reexamination program. *This authorization waives certain provisions of Section 8(o) (5) of the 1937 Act and 24 C.F.R. 982.516 as necessary to implement the Agency's Annual MTW Plan.*

Section E: Authorizations Related to Family Self Sufficiency-The Agency is authorized to operate any of its existing self-sufficiency and training programs, including its Family Self-Sufficiency (FSS) Program and any successor programs exempt from certain HUD program requirements. These may include those requirements governing program size or participation, including whether to

establish escrow accounts and other rent incentives and whether to establish mandatory self-sufficiency participation requirements. *This authorization waives certain provisions of Section 23 of the 1937 Act and 24 C.F.R. 984 as necessary to implement the Agency's Annual MTW Plan.*

CLIENT SERVICES

D1. Reinstate the Gateway to Self-Sufficiency Program

In 2008 CHA reinstated the Gateway to Self-Sufficiency Program. The Gateway to Self-Sufficiency program ended in previous years due to fiscal restraints; however, the Gateway and FSS programs were recognized as a national model for self-sufficiency by HUD. The Gateway program proposed would expand beyond its prior scope to provide extensive training for those families needing additional skills, education and motivation to transition to the FSS Program. The revised Gateway is a component of a newly created program, ***Currents of Change***.

Currents of Change will move families along a continuum of services to help all those who are able become self-sufficient. The program takes into consideration that each family will come to CHA with different strengths and weaknesses and a "one size fits all" approach will not work for most families.

Across the continuum, ***Current of Change*** will help stabilize and improve families by fortifying them through education, life skills, motivation and employment training to compete in the economic marketplace. CHA will collaborate with other service agencies to coordinate the delivery of services for our participants as they take the voyage from dependency to self-reliance, independence and self-sufficiency.

After moving into a CHA apartment, the head of household will be asked a series of questions to determine his/her level of need and the needs of other family members. We will then work to develop goals and outcome measures, and then match the family need to known services in the community. As the participant achieves the pre-established benchmarks under Gateway, they will be able to move to the next level of services, Gateway II, and Gateway III. This tiered approach to service delivery provides the participant the motivation necessary to move with the ***Currents of Change***.

Participants of the current FSS program at CHA will be moved into the new program at the appropriate level. ***Currents of Change*** will categorize residents via a tier system based on the type of services they will need to become self sufficient. Central Piedmont Community College (CPCC) completed an assessment of all families being served by public housing in 2006. The Section 8 household assessment results will be presented in January 2009. Residents are divided into four tiers.

- **Tier I:** Residents in this category will require more intensive services as they have the most severe and complex problems. The residents in this category will need long term services, intensive counseling and case management to assist them in achieving self sufficiency. These residents will start their ***Currents of Change*** journey in the Gateway Program.

- **Tier II:** Residents have at least two primary needs and three or more secondary needs. Residents in this category will need assistance in obtaining and maintaining employment. Life skills training will be key for this group to become self sufficient. Depending on their employment situation, residents in Tier II will start in the Gateway II program.

- **Tier III:** Residents do not have any primary needs and will only need minimal services to keep them informed of job opportunities and ongoing information. There is a low need for life skills training for this group to become self sufficient. These residents may be ready for Gateway III.

- **Tier IV:** Residents in this category are elderly or disabled. These families continue to need support and may be beyond the ability to live completely self-sufficient. Families with disabled individuals may be precluded from working or may have a family member who requires constant care so that neither the disabled individual nor the caregiver can provide for their own self-sufficient living. The families that may be able to find gainful employment and reach self-sufficiency will be handled on a case by case situation.

Currents of Change Program Components

Gateway: A new beginning, provides participants with basic building blocks toward self-reliance. We estimate the average family will spend up to a year in the Gateway program. Participants in the Gateway program will require intensive services as they have the most severe and complex problems. These families may have several primary and secondary needs and will need services focused on achieving and maintaining these basic needs prior to considering self-sufficiency goals.

The participants in this category need long term services, intensive counseling, health and wellness and case management to assist them in achieving self-sufficiency. Participants in the program are expected to attend all classes as assigned and obtain employment (not less than 15 hours a week). The 2006 assessment results indicated that 60.1% of the respondents are eligible for the Gateway phase of the program. As an incentive, bus passes will be available for job interviews, job training and the first two months of employment.

Gateway Services include:

Literary Classes and GED Preparation	Resume Writing/Dress for Success
Health and Wellness Classes	The Art of Interviewing
Educational Tutoring	Basic Computer Operations
Life Skills Classes(employment etiquette)	Counseling (as required)

Gateway II: Career Development, provides residents with the tools needed to enter his/her chosen career. A GED or High School Diploma and continuous employment (at least 15 hours a week) for the previous 12 months is required for entry to Gateway II. Participants in the Gateway II Program have at least two primary needs and three or more secondary needs. Participants in this program will need assistance in obtaining and maintaining employment. Life skills training will be key for this group to become self-sufficient. Life skills training will focus on the development of key skill needs to obtain and maintain employment. Results from the CPCC assessment indicate that 16.6% of the respondents will be eligible for this phase of the program. The incentive to be used in the Gateway II program will be the initiation of an incentive account and payment (when funds are available) for job training programs.

Gateway II Services include:

Scholarship for tuition/book assistance for classes structured to enable a fulltime career	Balancing Requirements of Work and Family
Financial Literacy classes (savings, budgeting, credit/debt. EITC, Prosperity to Wealth	Interaction with Colleagues
Career Mentoring	Meeting Job Performance Requirements

Gateway III: Asset Building is the final level. The goal of the Gateway III program is to obtain sustained income and housing independence. The estimated maximum time spent in this program is 2 years. In order to participate in the Gateway III program, the participant must have a continuous employment for a minimum of 30 hours a week for more than 12 months or more. Participants in the Gateway III program do not have any primary needs and will only need minimal services to keep them informed of job opportunities and ongoing information. There is a low need for life skills training for this group to become self-sufficient.

The emphasis for Gateway III families will be providing additional skills training to enhance opportunities to improve employment focusing on specific industries. Stabilizing and/or improving employment is a key to the success of families. Results from the CPCC assessment indicate that 4.2% of families will be eligible for this phase of the program. The stimulus for Gateway III participation is an IDA or Escrow for deposit on a new rental or homeownership opportunity.

Gateway III services include:

Homeownership/Rental Education/ Counseling	Good Neighbors Training and Education (preparations for private market)
Advance financial literacy education	Career Mentoring
Educational classes from Realtors and Lenders	Additional job training if needed

Currents of Change is implementing several programs to incentivize families where the head of household is working. One such program is *A Tutoring for Academic Advancement*, a customized curriculum for Grades K – 8. The program will work with parents and youth on literacy, studying and test taking, basic computer operations and individualized and personalized instruction to assist students in identified areas that have been challenging.

The City of Charlotte, like many cities across the country, is heavily impacted by the economy in the area of loss of jobs and wages for entry level positions that do not adequately prepare individuals for self sufficiency. The North Carolina Employment Security Commission states that North Carolina's unemployment rate of 5.8% is the highest it has been in 4 years. To help soften the impact of the currently shrinking job market, CHA has established a *Business Advisory Council* (BAC) to develop and promote employment and training opportunities for CHA residents by advising, advocating and supporting workforce development initiatives of the Charlotte Housing Authority.

The Business Advisory Council is comprised of targeted industry professionals (business owners, HR professionals, workforce professionals) of Charlotte-Mecklenburg. CHA will create programming based on the guidance BAC members provide about current area workforce needs. This will ensure that CHA residents receive appropriate preparation to respond to the skills gaps or job demands in our local economy.

Statutory Objective

Currents of Change is related to the statutory objective to promote work and self sufficiency among public housing and Section 8 program participants. The Gateway, Gateway II and Gateway III components will provide program participants the incentive to improve their life skills and motivate them to self-sufficiency.

Anticipated Impact

The anticipated impact on families participating in the Gateway Program will be increased employment, education and social skills to continue on a path to self-sufficiency in our Currents of Change program.

Baselines and Benchmarks

The baseline is set at zero (0) since there were no participants in the Gateway program when the 2008 – 2009 MTW Annual Plan was approved. The benchmark was to enroll 200 Public Housing and Section 8 families excluding elderly /disabled families by February 2009. There are presently 266 households participating in the Currents of Change program. In 2009, Currents of Change projects to serve a minimum of 800 clients in Gateway I, 200 clients in Gateway II and 200 Clients in Gateway III for a total of 1,200 persons. Job Fairs, Job University and access to career counseling will be provided to 100 residents. Thirty-five (35) or 18% of the participating residents will receive tuition/supplies subsidies for career-enhancing classes and twenty (20) or 10% of the participating residents will establish Escrow Accounts with amounts based on increased rent due to employment income. The numbers of participants participating in each Tier are documented in the following table:

Number of participants	Tier I	Tier II	Tier III	Tier IV
First Ward 117	0 0%	0 0%	116 99%	1 1.00%
Section 8 72	9 12%	49 68%	14 19%	0 0%
Victoria Square 28	11 39%	15 54%	2 0.07%	0 0
Claremont 43	31 72%	4 0.09%	8 19%	0 0
ROSS 26	7 27%	13 50%	6 23%	0 0
286	**58**	**81**	**146**	**1**

Data Collection and Metrics

Data will be collected through assessments and social services databases. CHA will utilize YARDI tracking software to maintain detailed records of individual progression.

Authorizations

Attachment C: Section B. Authorizations Related to Both Public Housing and Section 8 Section 8s: 1. Single Fund Budget with Full Flexibility: *This authorization waives certain provisions of Sections 8 and **9** of the **1937** Act and **24 C.F.R. 905, 982, and 990** as necessary to implement the Agency's Annual MTW Plan.*

D2. Youth Services

The Charlotte Housing Authority is focused on providing services for youth that are assisted by CHA housing programs as a means to help break the cycle of poverty. CHA aims to connect the youth to programs and services that address truancy, post-secondary education preparation, and academic performance improvement to name a few.

CHA has been working with Charlotte-Mecklenburg Schools (CMS), Communities in Schools of Charlotte-Mecklenburg, Inc. (CIS) Partners in Out-of-School Time (POST) and the Charlotte Housing Authority Scholarship Foundation (CHASF) to craft a cooperative agreement that outlines the roles and responsibilities for all partners. The partnership was formed with the following goals in mind:

- Establish and implement a policy to reduce truancy
- Offer youth programs and services that will benefit residents of CHA communities
- Develop and offer post-secondary education preparation for middle and high school students
- Establish a data sharing network that will enable parties to obtain essential data to aid in providing quality service and program development

Truancy

CHA is working with Charlotte-Mecklenburg Schools to determine how pervasive the "truancy" problem is for youth that receive any type of assistance from the Authority. CHA anticipates developing and enforcing a truancy policy. The enforcement of such a policy will involve a concerted effort from CHA, CMS, and the local court system.

School Programs

CHA strives to get more youth involved in programs offered by Communities In Schools. Communities In Schools (CIS) is the nation's largest and most effective dropout prevention organization, helping young people stay in school, successfully learn, and prepare for life by connecting needed community resources with schools. Communities In Schools (CIS) believes that all students need and deserve five basic resources to succeed in school and in life:

- A one-on-one relationship with a caring adult
- A safe place to learn and grow
- A healthy start – a healthy future
- A marketable skill to use upon graduation
- A chance to give back to peers and community

CHA will work with CIS to develop a pilot program during the 2009-2010 academic year.

Achievement Academy
CHA is exploring an Achievement Academy for rising 6th or 9th grade CHA youth who are behind in school. The intent of the Achievement Academy is to provide early transition assistance to rising middle and high school students. Students participating in the event would attend an intense summer academy that will focus on leadership, health and nutrition and academics. Each student is assigned a caseworker during the school session.

Scholarships
The CHA Scholarship Fund (CHASF) offers financial aid and guidance to any young resident under 25 years of age attending or planning to attend college, technical, or vocational school. In 2008, 80 youth were awarded scholarships. Through the community youth partnership, the target is to increase the number of scholarship recipients by proving post-secondary opportunities and mentoring.

2008 Charlotte Housing Authority Scholarship Fund High School and College Graduates

Out of School Programs
The mission of Partners in Out-of-School Time (POST) is to ensure that all school-age children and youth in Mecklenburg County have access to high-quality programs, activities, and opportunities when school is closed. "Out-of-School Time" refers to all of the hours before school, after school, teacher workdays, school holidays, weekends, and summers. POST's purpose is to build the capacity of individuals and organizations to provide high-quality out-of-school time programs, activities, and opportunities. POST will assist CHA with connecting youth to neighboring out of school programs.

Mentoring and Tutoring Relationships
CHA has further embraced its goal to sustain mentoring and tutoring relationships for an additional 100 resident youth by formulating Youth Services, the umbrella for:

- "Youth Link…Providing a Link to Opportunities"
- "Youth Works...Internship and Employment Program"
- "Youth Involved!...Leadership and Community Service"

Under the auspices of CHA's Client Services Department, Youth Services (YS) identifies recruits and connects CHA families to a menu of local youth programs that address issues affecting many of today's youth. In addition, YS will seek to engage the parent/guardian in parallel programs to foster parental involvement while addressing underlying issues that may contribute to youth delinquency and apathy.

CHA has formed strategic partnerships with *INSPIRE Youth Program* by Arbor Education and Training to enroll twelve (12) CHA youth. INSPIRE provides many services that help young people overcome barriers to employment and complete their education. In addition, the program provides leadership and job readiness training to help participants find employment.

The program consists of two stages of the Arbor's Passport Journey Process. Stage 1 consists of 50 hours of skills development in a professional business simulation setting. The curriculum combines job search, job readiness and life skills training with a supportive environment. Upon completion of Stage 1, the youth can move into one of five areas for placement: employment, post secondary training/employment (such as community college), occupational skills training/employment (such as CNA or HVAC), military and GED preparation.

There is no cost involved for program participation. In addition, INSPIRE will issue bus cards to address transportation barriers. Youth Services and INSPIRE will establish performance-based incentives for targeted participants based on achievement benchmarks. Activities such as special outings and special events are conducted by INSPIRE on a quarterly basis. The recruitment pool in the first phase of Youth Services will be the youth that reside in the identified working households of public housing and Section 8 homes.

The second strategic youth partnership involves The *Q Foundation* (QFI), a Youth GED & Employment Program. The Q Foundation, Inc. is a non-profit organization that is dedicated to the growth and development of youth in the state of North Carolina. Headquartered in Charlotte, NC, the Q Foundation, Inc. provides services to youth ages 4-21 years of age. The services that are provided are GED academic learning, work experience, life skills, Cognitive Behavior Intervention Training, athletic programs and year round employment opportunities and various other programs.

The GED and Employment Assistance Program helps 16-21 year-old residents of Mecklenburg County earn their GED and find employment. The program offers on-site GED labs, job readiness and employment assistance. In addition, the program offers leadership, work experience, career exploration, counseling and mentoring. The goal is to engage fifteen (15) participants from CHA (including Section 8 participants). There is no cost involved for program participation. QFI will issue bus cards to address transportation barriers. The recruitment pool in the first phase of Youth Services will be the youth that reside in the identified working households of public housing and Section 8 homes.

The Q Foundation also proposes to mentor CHA "Girls Only" by providing young women ages 8 – 18 with the necessary tools to become successful adults. The CHA heads of households for more than 80% of our residences are women; therefore, the future of our society will be based on the success of women in leadership roles. The Girls Only Program focuses on the evolving young woman and provides them with the knowledge to be effective leaders, role models, and problem solvers, which takes them away from the negative discord of society.

Statutory Objective and Anticipated Impact

The partnerships should yield incentives to families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient. If the youth are stimulated while in the classroom and are engaged in constructive activities during out of school time, the parents can focus on providing for the family and a better quality of life. CHA would like to pool resources and avoid duplication of services. It is anticipated that the partnerships will result in the provision of educational programs and access to services for program participants.

Baselines and Benchmarks

It was anticipated that the cooperative agreement would be executed August 2008. The execution timeframe was extended because it took longer than expected to create a framework that satisfied all partners. The final Agreement has been completed and was fully executed on September 26, 2008.

The baseline for the youth services programs is zero (0). The benchmarks are as follows:

PROGRAM	NUMBER OF PARTICIPANTS
Employment or Training Programs	85%
Completion of degree or certificate	70%
Completion of occupational certification	70%
Increase in literacy or numeracy	70%

Data Collection and Metrics
As programs are finalized, additional outcomes will be established. CHA anticipates that data collection will be done through a shared database that will be used to track those served by CHA, Charlotte-Mecklenburg Schools and identified programs. The new database will track the progress of the participants by all parties to the agreement.

Authorizations
Attachment B2: Partnership with For-Profit and Non-Profit Entities
The Agency may partner with for-profit and non-profit entities, subject to 24 C.F.R. Part 85 and 941.602(d), including, mixed-income, mixed-finance development partners and third party management companies, as well as affiliates and instrumentalities of the Agency ("Agency Partners"), to implement and develop all or some of the initiatives that may comprise the Agency's MTW Demonstration Program. The Agency may, with respect to MTW eligible activity and when working with or partnering with such partners, make available to Agency Partners the least restrictive regulatory requirements allowable based on Agency's participation in the MTW Demonstration Program and that agreements with Agency Partners may reflect the implementation of less restrictive regulatory requirements. *This authorization waives certain provisions of Sections 13 and 35 of the 1937 Act and 24 C.F.R. 941 Subpart F as necessary to implement the Agency's Annual MTW Plan.*

FINANCE AND ADMINISTRATION

E1. Create a Single Fund Budget with Full Flexibility

A single fund budget was established and adopted and approved by CHA Board of Commissioners for the fiscal year 2008-2009. CHA is able to determine the areas of greatest need for use of the limited resources with the creation of a single fund budget with full flexibility

Statutory Objective
By creating a single fund budget with full flexibility, CHA has achieved local flexibility in the design and administration of housing assistance to eligible families, thus reducing cost and achieving greater cost effectiveness in Federal expenditures.

Anticipated Impact
The greatest impact is CHA resources will be utilized more effectively and funding for programs will be aligned more accurately based on local needs. This flexibility allows CHA the ability to give incentives to families with children where the head of household is working, seeking work, or is preparing for work and to increase housing choices for low-income families.

Baselines and Benchmarks
The establishment of the MTW budget allows asset management projects (AMP) to be funded at amounts that would not have been possible without this funding flexibility. Proration of subsidy is always a challenge for public housing agencies; however, through funding flexibility internal AMP are funded at 100% of calculated subsidy.

Data Collection and Metrics
CHA will measure the success of this activity through various financial reports and the annual audit. CHA will follow the same financial management procedures that are currently in place.

Authorizations
Attachment C: Section B. Authorizations Related to Both Public Housing and Section 8 Section 8s: 1. Single Fund Budget with Full Flexibility: *This authorization waives certain provisions of Sections 8 and 9 of the 1937 Act and 24 C.F.R. 905, 982, and 990 as necessary to implement the Agency's Annual MTW Plan.*

E2. Adopt Investment Policies Consistent with State Law

CHA adopted investment policies consistent with state law to the extent such policies are in compliance with applicable OMB circulars and other federal laws as a result of HUD approval of the 2008 – 2009 plan. CHA shall invest only in securities authorized under state law that will allow the flexibility to invest productively and efficiently.

Statutory Objective
Following this investment practice will reduce costs related to investing and achieve greater cost effectiveness in Federal expenditures, thus allowing CHA ability to give incentives to families with children where the head of household is working, seeking work, or is preparing for work and to increase housing choices for low-income families.

Anticipated Impact
By utilizing investment policies consistent with state law CHA will achieve a portfolio which is safer, more liquid and obtains a competitive yield. Current HUD eligible investments if utilized fully are outdated and more risky than should be entered into by CHA. The North Carolina governmental entity eligible investments are more up to date and safer for governmental funds to be invested. CHA will invest in safer investment instruments with a lower transaction cost and competitive yield. This will give CHA a higher return on its portfolio with less staff resources devoted to the process. This reduced cost and higher net portfolio return will achieve greater cost effectiveness in Federal expenditures.

Baselines and Benchmarks
CHA will review the 2007-2008 interest rates earned on investments utilized under the current HUD eligible investments by month. The Authority will then track the 2008-2009 interest rates on similar HUD eligible investments during the year as well as the rates on the new North Carolina governmental entity eligible investments during the year.

Data Collection and Metrics
CHA has created a table with the 2007-2008 HUD eligible investments interest rate data, 2008-2009 HUD eligible investments interest rate data, 2008-2009 North Carolina governmental entity eligible investments interest rate data and the difference in the two 2008-2009 interest rate columns. The data will then be reviewed to see if a higher interest rate was achieved under the new portfolio strategy. If a higher rate is achieved the higher net portfolio return will result in greater cost effectiveness in Federal expenditures.

The rate data is not available for review at this time due to a required secondary approval from HUD in addition to the MTW Plan Approval. That approval was requested when the plan was approved, but was not received from HUD until July 13, 2008. Upon approval by HUD the CHA Investment Policy was revised and approved by the Board of Commissioners in September 2008. The first investments under the revised policy were made on October 3, 2008. Staff is obtaining data to begin comparisons of HUD investment rule results and State investment rule results, but the comparisons will not begin until after collection of the 3rd quarter FY 2008 – 2009 investment rates.

Authorizations
Attachment C: Section B. Authorizations Related to Both Public Housing and Section 8 Section 8s: 5. Investment Policies-*This authorization waives certain provisions of Section 6(c) (4) of the 1937 Act and 24 C.F.R. 982.156 as necessary to implement the Agency's Annual MTW Plan.*

REAL ESTATE

F1. Use single-fund funding flexibility to develop additional units
A key real estate initiative involves using block grant funding to leverage financing for the development of additional affordable housing units. These units will primarily be in mixed income developments and will be developed directly with CHA as developer or in partnership with other qualified affordable housing developers. The goal is to produce on average, 100 units of new or rehabilitated affordable housing units each year of the Moving Forward program. The units will be developed in a way that supports the overall goals of de-concentration of poverty and in locations that support our residents' efforts to move up and out of public housing.

CHA did not defer or eliminate any PHA activities to develop additional units. CHA had planned new units, utilizing its asset repositioning strategy and leverage from various federal, state and local resources (tax credits, Housing Trust Fund, etc.) The MTW funding enhances that strategy and gives the Authority the opportunity to meet additional MTW goals including housing choice and self-sufficiency, by producing more units in diverse neighborhoods. CHA had planned to move much more aggressively into apartment acquisitions to take advantage of opportunities in the current market with the use of MTW funds. While HUD's approval of the new TDC formula was a good step, CHA will need the requested approval of an exception or waiver of the "pro-rata" rule to make significant increases in production through apartment acquisition.

The Real Estate Division is proposing to introduce three programs to the Charlotte Housing Authority: Neighborhood Revitalization Apartment/Unit Acquisition Program, Neighborhood Stabilization National Legislative Program, and Capital Fund Financing.

a. <u>Neighborhood Revitalization Apartment/Unit Acquisition Program</u>
Please note that the following program concept is being explored as a framework and presented for HUD approval. Each individual real estate transaction will be reviewed by the Board per its usual Development Committee process.

In FY 2008 – 2009, CHA outlined a program to guide interest in either acquiring existing apartments and/or partnering with apartment owners. It is believed that with a combined investment of $4 million in CHA funds and $4 million in Housing Trust Funds, CHA could partner to substantially rehab 800 units in 4 major complexes, while producing 160 units affordable at the City's target of 30% of median and below in revitalized mixed income communities.
Assumptions:

1. Identify 4 major apartment complexes of approximately 200 units each with a priority for areas targeted by the City.

2. Earmark $4 million in CHA funds and $4 million in HTF funds

Scenario A: CHA partners with existing landlords

1. CHA effectively "buys" 20% of the units in a complex, and pays appraised value for them. (assume $50,000/unit x 40 units = $2 million).

2. CHA provides $1 million in financing, matched by $1 million from HTF.

3. Owner takes the $2 million and uses it to rehab all 200 units according to a pre-determined scope of work

4. CHA provides on-going Section 9 subsidy to the 40 units affordable at 30% of median income, which will cover the operating cost of those units; and provides on-going social services for those residents.

5. The owner benefits from a revitalized asset which helps stabilize the community and may generate higher rents on the non-affordable units.

Scenario B: Affordable housing developer (CHA or other) uses the Apartment Rejuvenation program and other conventional or below-market financing to purchase the entire property. Basically the same steps as above, but more below-market financing will be available through the nonprofit affordable housing owner, so the public funds will be better leveraged. This option would be available to owners who wanted to sell 100% of their complex.

b. <u>Neighborhood Stabilization National Legislative Program</u>

Please note that the following program concept is being explored as a framework and presented for HUD approval. Each individual real estate transaction will be reviewed by the Board per its usual Development Committee process.

CHA has proposed to the City of Charlotte's Neighborhood Development to consider implementing a strategy using the Neighborhood Stabilization National Legislation for communities with high foreclosures to convert some of the single family for sale or lease-purchase units to rental units to enable CHA to partner. These proposed rental units (affordable to the City's target households at 30% of median income) could be used strategically to stabilize units physically and create a healthy mixed income community.

CHA has over 900 Section 9 (ACC) rentals available as well as limited federal funding to make capital subsidies available when needed in conjunction with the Section 9 rental subsidies. The amount of the rental subsidy is calculated in accordance with a HUD formula. It is anticipated that the subsidy plus the common area utilities would range between $250 to $310 per unit monthly, depending on unit age and size. CHA would mandate that residents placed in these new rental units be active participants in a program with requirements similar to the Family Self-Sufficiency Program. Social services would be provided to those residents through community partnerships. CHA would remain open to partnerships with the WISH program.

Section 8 rental subsidies are a much more limited resource in the community, but CHA would be willing to explore making them available as well in accordance with an agreed-upon and more limited program.

Lastly, the legislation also contains a provision for addressing foreclosed multi-family rental developments. CHA has a number of broker relationships and is

actively pursuing opportunities for acquisition/rehab. CHA would like for the City of Charlotte's plan for the distribution funds under the legislation to include a provision for the acquisition of multi-family rental properties, especially in strategic neighborhoods that are identified as priorities in the City's plans.

c. **Use of the Capital Fund Financing Program at Charlottetown and Strawn**

In FY 2009-10, CHA plans to use the Capital Fund Financing Program (CFFP) in combination with tax exempt bonds, 4% tax credits, capital funds, MTW and City Housing Trust Fund monies to complete a substantial rehabilitation of two seniors towers, built in 1970 and 1977 respectively. These towers at Charlottetown (180 units) and Strawn (196 units) are structurally sound and located virtually adjacent to Charlotte's booming Uptown area, accessible to public transportation and a wide range of services.

Strawn Apts. for Senior/Disabled, Charlotte, NC

The plan is to apply for demolition/disposition using the new streamlined process (which has not yet been released by HUD) to allow for the transfer of the buildings to LLCs, assemble financing and begin rehabilitation in early 2010. At this time, we plan to complete renovations floor by floor, upgrading systems and making all changes outlined in the most recent capital needs plan. In addition, we have planned a significant upgrade for the exterior of the buildings, making them more compatible with the new development planned around them and improving livability for the resident seniors and persons with disabilities.

d. Allow Interim Construction Loans and/or Bridge Loans that are not subject to TDC or Proportionality Guidelines:

Given the recent economic downturn, there are a series of unique opportunities in the market to purchase land and/or apartments and/or single family units that have significantly dropped in price or which may be candidates for pending foreclosures. Under the former Mixed Finance (HOPE VI) guidelines, if the end product of a land purchase or rental acquisition was to be a mixed income development, then the amount of the interim financing that could be provided with HUD funds was limited to an amount determined by multiplying the number of Section 8 or 9 units by the per unit HUD TDC formula. Thus if 50% of a development is proposed to be HUD subsidized and 50% is proposed to be market rate, then only 50% of the construction/acquisition loan could be MTW funds and the other 50% would have to be financed by a non-HUD source.

In today's market, this HUD TDC and/or proportionality requirement will make acquisitions virtually impossible because very few banks are making market-rate construction or acquisition loans. In addition, the approval time of such loans effectively eliminates the ability of CHA to move quickly to take advantage of

opportunities in this rapidly changing market. CHA is proposing to apply the higher of the following two limits to the construction/acquisition loan amount:

1. CHA will not invest more than 50% of the MTW funds currently available for development in land or apartment acquisition interim loans.
2. The amount of each loan will be limited as follows:
    a. A land acquisition loan cannot exceed the appraised value of the property
    b. An apartment or single family property acquisition loan cannot exceed the appraised value of the property and/or an amount determined by the number of units x the local per unit TDC. After the acquisition, rehab and stabilization of the property, CHA will be able to put 501©(3), 221d4, tax exempt bond or other financing in place that would cover the permanent mortgage for the non-restricted units and the MTW interim loan would be reduced to an amount not to exceed the TDC on the Section 8 or 9 units. Worst case, if the markets have not recovered and this alternative financing is not available, the property acquired would be 100% Section 8 or Section 9 at permanent financing and would still be in compliance with overall HUD cost guidelines on a permanent basis.

This process will enable CHA, an experienced affordable housing developer with an excellent track record, to expand housing choices by acquiring properties at a significant discount in a rapidly changing market in which conventional acquisition financing is a barrier to entry. Being our own acquisition/construction lender enables us to receive more favorable construction terms. Additionally, the process would allow CHA to negotiate market rate properties more competitively because less time is required to obtain financing and closings are not delayed. It will also achieve administrative cost savings because it will not be necessary to go through several months of conventional bank loan processing with its delays and fees.

Statutory Objective

The production of additional new units and the acquisition and rehabilitation of existing units will meet the statutory goal of increasing housing choices of low income families by adding 1000 new and rehabbed units to the affordable housing stock in Charlotte over the course of the 10 year MTW program.

Anticipated Impact

The Charlotte community will have an increase of 100 new or rehabbed units resulting in an addition of 1,000 new or rehabbed affordable units in Charlotte over the course of the 10 year MTW program. The additional "gap" or leveraged financing made available through use of MTW funds will assist CHA in improving competitive scoring for a wide range of local, state and federal funding programs.

Baselines and Benchmarks
Since this is a unit production initiative, the baseline is set at zero (0). The benchmark will be to add 100 new or rehabilitated units financed through MTW funding to the stock of affordable housing each year. The overall ten-year benchmark will be to produce 1,000 new or rehabbed affordable units.

The Real Estate Division is using single-fund flexibility to acquire 60 units at Fairmarket Square of which 16 units are Section 9 and 50 units in Seneca Woods of which 16 are Section 9. Rehabilitation is scheduled to be completed by March 31, 2009. The Real Estate Division will exceed its 100 unit target for the first MTW Fiscal Year.

Data Collection and Metrics
Total unit production numbers will be provided each year with additional information on the community income mix, neighborhood amenities and whether these units promoted de-concentration.

Authorizations
Attachment C-D, Section 1(b): The Agency may use this funding source to carry out the purposes of the MTW Demonstration Program…to increase housing choices for low-income families, through activities that would otherwise be eligible under sections 8 and 9 of the 1937 Act, including but not limited to , the following activities: …..(ii)The acquisition, new construction, reconstruction or moderate or substantial rehabilitation of housing (including but not limited to, assisted living or other housing as deemed appropriate by the Agency, in accordance with its mission).

F2. Develop a Unit Production Program in Partnership with Charlotte Mecklenburg Schools

During the first MTW year, CHA explored a partnership with Charlotte Mecklenburg Schools to produce mixed income affordable housing units at new suburban school sites. Because of its exponential growth in the past ten years, CMS has embarked on a new school construction program supported by a major bond approval in the fall of 2007. In several instances, in order to obtain a school site, CMS had to purchase a larger piece of property than was required for the school development alone. CMS and CHA have had on-going discussions about whether the "excess land" at such sites could be developed by CHA alone or in partnership with others as mixed income rental housing. The goal in this planning year would be to identify one site that would be feasible for such a development and complete preliminary due diligence. This work with CMS would also support our growing partnership described in the Client Services section of this MTW plan.

CHA did not defer or eliminate any PHA activities to develop additional units. CHA had planned new units, utilizing its asset repositioning strategy. The MTW

funds would increase the production rate, if the pro rata rule could be waived or an appropriate exception approved.

Boulevard Proposal

CHA continues to plan for a 2009 HOPE VI application to redevelop its Boulevard Homes property. We are partnering with Charlotte Mecklenburg Schools (CMS) to locate a K-8 school on the site as well as working with an area daycare provider to build onsite. In addition, CHA is partnering with Central Piedmont Community College (CPCC) to provide adult education and job training onsite. The redeveloped property will be a school-centered community with enhanced education opportunities for adults and children, holistic case management services and recreational programming. In order to prepare for this redevelopment, CHA will begin relocation and demolition in 2009-2010. Relocated families will be provided case management services under the Currents of Change Program to help them meet the requirements to return to the redeveloped site. CHA may also partner with other entities in the community to bring additional services and educational opportunities to the redeveloped neighborhood.

Statutory Objective

The production of units in partnership with CMS at new suburban school sites would meet the third statutory goal of increasing housing choices of low income families.

Anticipated Impact

This would be an important step in the de-concentration of poverty and the re-integration of Charlotte schools as the new suburban schools are typically in high income areas away from the city center.

Baselines and Benchmarks

This is a unit production initiative; therefore, the baseline will be set at zero (0). The benchmark for year one will be to identify one site that would be feasible for a CMS/CHA development and complete preliminary due diligence.

As of October 2008, CHA has identified Boulevard Homes as a site for a new CMS school. Site planning sessions were held in July 2008 and funding commitments are anticipated by June 2009. CHA's Real Estate Division is also working on a Rama Road site and possibilities of a re-positioning of Meadow Oaks, as well as a proposal for units at West Providence Road Elementary. Due diligence will be completed in Fiscal Year 2009 – 2010.

Data Collection and Metrics

A report on the progress of site identification will be provided at the end of year one.

Authorizations
Attachment C-D, Section 1(b): *The Agency may use this funding source to carry out the purposes of the MTW Demonstration Program…to increase housing choices for low-income families, through activities that would otherwise be eligible under sections 8 and 9 of the 1937 Act, including but not limited to , the following activities: …..(ii)The acquisition, new construction, reconstruction or moderate or substantial rehabilitation of housing (including but not limited to, assisted living or other housing as deemed appropriate by the Agency, in accordance with its mission)…..*

F3. More Aggressive Use of Project-based Section 8

A. Streamlined Project-Based Section 8 Process

This initiative is described in two components, based on the ownership of the units. The goal is to get as many project-based Section 8 units as possible in the following types of areas: (1) stable Charlotte neighborhoods (in accordance with the City's neighborhood evaluation tool); (2) neighborhoods where there is an active neighborhood revitalization plan and (3) neighborhoods along Charlotte's new transportation corridors, including the light rail. CHA will seek Board approval of the number of units to be project-based on an annual basis. We are requesting authorization to project-base 200 units in the second year of MTW operations (FY09-10).

In line with the second MTW statutory objective of self-sufficiency, CHA proposes to limit family resident participation in this project-based Section 8 program to families in which at least one household member is working or participating in a training program for a minimum number of hours/week to be determined through the first year of MTW planning. The family would also be required to participate in a Family Self-Sufficiency Program. This work/training and FSS requirement would not apply to seniors units or to housing for persons with disabilities or other special needs populations.

MTW flexibility allowed CHA to change the process which made it possible for us to have a streamlined approval process that correlated with various local funding sources. This flexibility has been really important to our ability to use Section 8 at Cherry Gardens, a new seniors complex and at the YWCA's Families Together development, which provides extensive services to families in moving to self-sufficiency.

Units Owned by CHA: CHA will project-base Section 8 at properties owned directly or indirectly (through participation as a member in a tax credit or other LLC), subject only to HUD subsidy-layering rules. No process through the local field office will be required. CHA will certify compliance with subsidy layering rules.

Units not owned by CHA: Where CHA is not directly or indirectly an owner, CHA staff will rely on the North Carolina Housing Finance Agency (NCHFA) tax credit process as its competitive process. In non-tax credit deals with local City government funding, CHA will rely on the City's Housing Trust Fund competitive process. Where no tax credits or City funds are present, but the development has AHP funding, CHA will rely on that competitive process for approval. Where there is no other competitive process present, CHA has designed its own competitive process and will submit a description of that process to HUD Headquarters for approval.

Whether units are owned by CHA or by another entity, we will rate the availability of amenities in the neighborhood using the City of Charlotte's neighborhood assessment tool by which they rate neighborhoods as fragile, improving, declining or stable. The goal will be to get as many units in stable neighborhoods as possible. Where units are placed in other neighborhoods, we will provide information on whether there is an active neighborhood revitalization plan. We will establish bonus points for any units made available in Uptown Charlotte or on the new transportation lines, including the light rail line.

In the first year of the MTW program, CHA will continue to use the Site Selection Standards currently set forth in 24 CFR Section 983.57. CHA would like to reserve the ability to study the impact of these rules on year one production, and possibly develop a new set of standards in accordance with Attachment C-D (7)(c) in subsequent years of the MTW program.

Statutory Objective

This initiative will enable CHA to reduce cost and achieve greater cost effectiveness in Federal expenditures: CHA anticipates that a simple, streamlined process will (1) encourage more non-profit and for-profit developers to participate in the program, which will increase market penetration; (2) create incentives for self-sufficiency by requiring that participating families meet a work requirement and participate in an FSS program; (3) increase housing choices for low-income families in high amenity neighborhoods and especially along Charlotte's new transportation corridors.

Anticipated Impact

Simplified selection processes will make it significantly easier to maximize the number of Section 8 assisted units in higher quality units and in a larger number of high-amenity Charlotte neighborhoods. As Charlotte's new transportation system develops, this initiative will substantially increase CHA's ability to get project-based Section 8 units on the light rail and other new transportation corridors - which is of critical importance to residents for transportation to other jobs and services.

Baselines and Benchmarks
We established the initial baseline at the number of project-based Section 8 recently developed through voucher conversion and currently available in Charlotte (HAP contracts are currently in place or in process for 228 such units). We will measure the impact of this initiative by counting the number of additional units that are made available through this program in high amenity Charlotte neighborhoods on an annual basis.

Applications are proposed or in process for the following Project Based Section 8 potential developments:

Community	FY2008 - 2009
McCreesh II	26 PBS8 efficiencies
YWCA Families Together	10 PBS8 2 and 3 BR apartments
Lane Sarver/Open Door	10 PBS8 1 BR apartments
Cherry Seniors	13 PBS8 1 and 2 BR apartments
Total	**59**

CHA staff recommended and the Development Committee approved a 32-unit reduction of PBS8 in the Seigle Point Apartment Homes development at the July 2008 meeting. Charlotte continues to look for other opportunities to meet the 100 PBS8 unit target by the end of the Fiscal Year.

Data Collection and Metrics
The baseline will be established in a chart. New units will be added annually with an indication of whether they are in stable neighborhoods; neighborhoods with an active revitalization plan or in a "bonus" neighborhood as defined above.

Authorizations
Attachment C-D, #7, Sections (a); (b); (c) and (d): Establishment of an Agency MTW Section 8 Project-based Program. *This authorization waives certain provisions of Sections 8(o)(13)(B and D) of the 1937 Act and 24 C.F.R. 982.1, 982.102 and 24 C.F.R. Part 983; certain provisions of 24 C.F.R. 983.51*; Adopts site selection standards in accordance with Attachment C and in lieu of the Site Selection Standards currently set forth in 24 C.F.R. Section 983.57; and *waives certain provisions of Section 8(o)(8) of the 1937 Act and 24 C.F.R. 982 Subpart I as necessary to implement the Agency's Annual MTW Plan.*

B. Implement the Requested MTW Operational Changes for Project-Based Section 8:
These proposed measures, including site-based waiting lists, etc., are described in full detail in the Operations section.

F4. Increasing the Acquisition/Rehabilitation of existing multi-family properties

In light of rising construction costs and in the face of continued Not In My Backyard (NIMBY) opposition to affordable housing development in higher income areas of Charlotte, CHA proposes that a key component of the unit production portion of the Moving Forward Plan would be driven by an aggressive acquisition/rehabilitation program. In anticipation of MTW status, the Finance and Real Estate Departments successfully negotiated a $5 million acquisition line of credit agreement with Fifth-Third Bank.

The strategy would be to option existing properties and finance their acquisition with a combination of land sales proceeds and a draw on the line of credit. CHA would then have site control of the property and could proceed to stabilize the community and put leveraged financing in place - most likely a combination of tax-exempt bond, 501(c)(3), AHP or other financing. Typically it takes over a year to put such leveraged financing together. At the closing of the financing, the line of credit will be repaid and would be available to gain site control on the next transaction. The goal would be to make no more than 40% of the rehabilitated community affordable, so that the end product is a self-supporting mixed-income community.

In FY08-09 CHA proposed to acquire 150 units using the acquisition/rehabilitation model for one or more apartment acquisitions. Site selection in that first year will be guided by the Site Selection Standards in 24 CFR 983.51, but will not require prior HUD approval. CHA will certify compliance with the Site Selections Standards to HUD. CHA proposes to substitute its own criteria in accordance with the provisions of Attachment C-7-c at the end of the first program year.

CHA did not defer or eliminate any programs or activities to develop additional units. The MTW funding enhances the acquisition strategy and gives the Authority the opportunity to meet additional MTW goals including housing choice and self-sufficiency, by producing more units in diverse neighborhoods. CHA had planned to move much more aggressively into apartment acquisitions to take advantage of opportunities in the current market with the use of MTW funds. While HUD's approval of the new TDC formula was a good step, we will need the requested approval of an exception or waiver of the "pro-rata" rule to make significant increases in production through apartment acquisition.

Statutory Objective

This initiative meets all three statutory objectives. Acquiring existing properties is more cost-effective and quicker than the new construction process; Acquisition of properties in areas with good amenities assists families in becoming self-sufficient; and the addition of these units by acquisition/rehab will increase the housing choices for low income families.

Anticipated Impact
The first year acquisition of a total of 150 units of which 30% (50 units) would be affordable will increase the overall housing stock in locations in which we may not otherwise have units. If the model is successful, we should be able to substantially increase our inventory of affordable units over the course of the MTW period.

Baselines and Benchmarks
Because this is a production program, the baseline at the beginning of MTW is zero (0). The benchmark will be to add 50 rehabilitated units per year as part of the overall goal to produce 100 units per year (see D1, above). The overall goal over the 10 years of the MTW program is to acquire and rehab 500 existing units as part of the overall goal to produce 1,000 units, through new construction and rehabilitation.

CHA will use the same units in the single fund funding flexibility initiative above: Fairmarket Square (60 units, 16 Section 9); Seneca Woods (50 units; 16 Section 9). Rehabilitation is scheduled to be completed by March 31, 2009. This will enable CHA to exceed the benchmark by 60 units. CHA was approved to use the new Fifth-Third line of credit as part of the financing for this transaction. CHA will have a challenge getting bids within budget and getting rehabilitation work completed with residents remaining in place.

Data Collection and Metrics
The staff will maintain records of all properties that are acquired and/or rehabilitated in a database. Documentation will include challenges in getting bids within budget and completing rehabilitation work with residents remaining in place.

Authorizations
Attachment C-C 13 Site Acquisition-The agency is authorized to acquire sites without prior HUD approval, provided that the agency certifies that HUD site selection requirements have been met. *This authorization waives certain provisions of 24 C.F.R. 941.401 as necessary to implement the Agency's Annual MTW Plan.*

F5. Initiatives Related to Localizing and Streamlining Development or Evaluation Processes to Increase Efficiency and Reduce Development Time and Cost

A. Land Acquisition for Future Affordable Housing Development Use

It is very important to CHA's overall Moving Forward plan to secure as many good locations as possible along the new transit corridors and light rail and in rapidly developing areas of Charlotte. Charlotte is in a stage of very rapid growth and waiting to purchase these sites until full project financing is in place will mean the loss of key opportunities to build housing for our residents in the best locations with the best amenities to support their efforts at self-sufficiency. Therefore, CHA requested and was approved for the ability to option and purchase land (or sites

appropriate for demolition and/or rehab) without funded development plans in place.

CHA will certify that it has met the HUD Site Selection Standards. CHA also plans to set forth for HUD approval proposed criteria under which it would be allowed to purchase property in excess of appraised value (to gain site control in a rapidly gentrifying area, etc.).

Statutory Objective
Controlling land early in the development process can result in significant cost saving and CHA will be securing sites that provide more housing choices for low income families.

Anticipated Impact
This initiative would allow CHA to acquire properties for residential affordable housing development in rapid growth areas before land costs become prohibitive.

Baselines and Benchmarks
The baseline will be set at zero and the staff will track location and cost of acreage added as well as projected plans for development. The goal was to acquire one site in the first two years of MTW program operation.

CHA closed on vacant land at Krefeld Drive 3rd quarter FY2008 – 2009. The site will accommodate 99 units.

Data Collection and Metrics
The staff will chart the location and cost of acreage of land acquired using the Site Acquisition waiver. Analysis of this data will depend on the local real estate economy. In order to accurately assess whether CHA was able to acquire land at a cost savings, current market conditions will have to be factored in.

Authorizations
Attachment C-C13 Site Acquisition-The agency is authorized to acquire sites without prior HUD approval, provided that the agency certifies that HUD site selection requirements have been met. *This authorization waives certain provisions of 24 C.F.R. 941.401 as necessary to implement the Agency's Annual MTW Plan.*

B. Streamlined Development Approval Process

To successfully increase the number of self-supporting affordable Section 8 and Section 9 units in Charlotte in support of the Moving Forward initiatives, CHA proposes to use the new Evidentiary Waiver process approved by HUD in the Mixed Finance group for all transactions and requests that Mixed Finance staff at HUD be authorized to review the process subject to waiver approval from the HUD Secretary's office.

Real Estate intends to use the Evidentiary Waiver process for all future transactions. The process was successfully used for McAlpine and Glen Cove.

Statutory Objective
This streamlined process will reduce cost and achieve greater cost effectiveness in Federal expenditures.

Anticipated Impact
CHA anticipates a time savings in using the Streamlined Development Approval Process despite the necessity of required legal work.

Baselines and Benchmarks
The staff will analyze the last five Mixed Finance applications prior to the execution of the MTW agreement and compare them to the first five Mixed Finance applications processed under the new procedures.

Two additional transactions (Fairmarket and Seneca) should be processed using this method in the first year of MTW.

Data Collection and Metrics
The staff will measure time from the filing of the demo-dispo application to its final approval, as well as compare legal expenditures.

Authorizations
Attachment C-C7 Simplification of the Development and Redevelopment Process for Public Housing. *This authorization waives certain provisions of Sections 4, 5, 9, 24, 32 and 35 of the 1937 Act and 24 C.F.R. 941 as necessary to implement the Agency's Annual MTW Plan.*

C. Develop Local Design Standards

CHA proposes to adopt local design standards that will correlate with other funding sources available in Charlotte and the state - primarily those of the North Carolina Housing Finance Agency. This will eliminate the need to expend funding on multiple architectural reviews to ensure that various requirements are met. In addition, the NCHFA standards are subject to a statewide public review and comment process each year to ensure that they meet changing building guidelines and local standards. As a state agency authorized to expend federal funds, the NCHFA guidelines meet all applicable federal requirements. CHA notes that the new standards will benefit the agency because our standards will match the standards of North Carolina Housing Finance Agency (NCHFA) and the Housing Trust Fund (HTF). There is a time savings when there is one coordinated set of designs for the local, city, state and now federal levels. In addition, architectural review cost will be decreased.

In the first year of MTW, CHA proposed to complete an in-depth analysis of the North Carolina Housing Finance Agency's design standards (www.NCHFA.org). The goal will be to adopt those standards as the local design standards (with whatever minor modifications are necessary) by March 2009.

Statutory Objective
Development of local design standards will reduce cost and achieve greater cost effectiveness in Federal expenditures.

Anticipated Impact
One set of local standards should eliminate the need for multiple, costly architectural reviews and still ensure a very high quality product.

Baselines and Benchmarks
HUD-approved local design standards do not exist. The goal is to establish the standards by March 2009.

Real Estate staff is working on using the NCHFA standards as a baseline and seeking input from staff and developers. Draft completion date planned for December 31, 2008.

Data Collection and Metrics
The staff will collect data on various design standards, as well as keep track of pertinent changes that are made to those standards.

Authorizations
Attachment C-C12. Design Guidelines-The Agency is authorized to establish reasonable and modest design guidelines, unit size guidelines and unit amenity guidelines for development and redevelopment activities that will replace HUD guidelines with guidelines that reflect local marketplace conditions for quality construction in its locality so long as all units meet housing quality standards approved by the Secretary. *This authorization waives certain provisions of Sections 4, 5, and 9 of the 1937 Act and 24 C.F.R. 941.202, 941.203, 941.401, and 941.403 as necessary to implement the Agency's Annual MTW Plan.*

D. Establish Local Total Development Cost (TDC) Limits

In the first year, CHA proposed to adopt local TDC standards that reflect local marketplace conditions for quality construction in our locality. CHA will pay particular attention to developing standards that will apply to the higher density; structured parking type developments that will be built in Charlotte's rapidly developing Uptown area, as well as dense development along the new transportation corridors, especially the light rail lines. This will ensure that CHA does not miss opportunities to develop Section 8 and Public Housing units in these dense urban environments, as well as incentivizing non-profit and for profit developers to include Project-based Section 8 units in their newest developments.

CHA will do an in-depth analysis of HUD's current TDC guidelines and work with ULI and others to develop appropriate local standards.

Statutory Objective
Established local TDC limits will reduce cost and achieve greater cost effectiveness in Federal expenditures and increase housing choices for low-income families.

Anticipated Impact
Local standards should help CHA increase the number of Section 8 and Section 9 units in highly desirable areas of Charlotte—especially the more dense, urban developments.

Baselines and Benchmarks
A baseline of production cost will be established in year one of MTW for new units in dense, urban environments. Once the baseline has been established we will track the number of developments we are able to complete in each year in these environments and determine whether it is a net increase over past production. The benchmark for success will be a 10% increase in production in high cost areas.

The proposed new Total Development Cost Limits was drafted and is under review by CHA Senior Staff.

Data Collection and Metrics
The staff will chart the number of developments under the new TDC limits that CHA was able to complete with documentation of the environment and compare it to past production (baseline).

Authorizations
Attachment C-C16 Total Development Cost (TDC) limits-*This authorization waives certain provisions of Section 6(b) of the 1937 Act and 24 C.F.R. 941.306 as necessary to implement the Agency's Annual MTW Plan.*

E. Revised Subsidy Structure for Developments in which CHA is Direct Developer
CHA has had a very successful history in HOPE VI mixed-income development. While every effort has been made to provide one for one replacement, the public housing inventory is still below the legislative cap. Given the extreme shortage of affordable units to families making less than 30% of median income in Charlotte, CHA would like to use this initiative to increase the economic feasibility of a limited number of transactions involving public housing subsidy, in which CHA would act as the direct developer.

CHA will design a new rent structure for new and rehabilitated Public Housing for working families who will pay 30% of their income for rent. For these developments,

CHA will set its monthly rental subsidy at the average rent in the submarket in which the development is located. A portion of the rent would be paid by the PEL amount, but if the PEL is below the average rent in the submarket, or if the PEL is not fully funded in any given year, CHA would use MTW block grant funds to make up the difference. This would allow CHA to put unused public housing units on the ground (up to the statutory cap) and receive the related capital fund allocations. Ensuring that the rent stays at a set level increases the ability to finance the units with mortgage or other leveraged financing that could not be serviced at the lower rent levels.

Statutory Objective
The revised structure will reduce cost and achieve greater cost effectiveness in Federal expenditures by providing better leveraging and maximizing the housing available at 30% of median income and provide more housing choices for low income families.

Anticipated Impact
If the initiative is successful, up to 400 units could be financed in this way over the course of the 10 year period. It is anticipated that no more than 50 units would be financed under the new housing initiative in the first MTW year.

Baselines and Benchmarks
This is a production program; therefore, the baseline is set at zero (0). The benchmark will be the production of 50 units in year one and up to 400 units over the course of the 10 year period.

There have been preliminary discussions about providing full PEL funding (without proration) for future developments in which CHA is direct developer.

Data Collection and Metrics
The staff will track the number and type of projects constructed or rehabilitated.

Authorizations
Attachment C-C7-Simplification of the Development and Redevelopment Process for Public Housing-*This authorization waives certain provisions of Sections 4, 5, 9, 24, 32 and 35 of the 1937 Act and 24 C.F.R. 941 as necessary to implement the Agency's Annual MTW Plan*. Attachment C-B, #1-Single Fund Budget with Full Flexibility-*This authorization waives certain provisions of Sections 8 and 9 of the 1937 Act and 24 C.F.R. 905, 982, and 990 as necessary to implement the Agency's Annual MTW Plan.*

F6. Housing for Persons with Disabilities, Special Needs and Homeless

CHA has an on-going commitment to provide housing for persons with disabilities and special needs and the homeless. This is a key part of the overall Moving

Forward plan for a number of reasons. It is important that CHA take an active role in ensuring that the Moving Forward program is implemented smoothly without a major shock to the existing systems and with full consideration for the needs of resident families. So, this strengthening of the safety net is important to the overall goal of the Moving Forward program to assist people to become economically self-sufficient.

This initiative will create and enhance relationships with local social service provider agencies—whose involvement will be extremely important to our Moving Forward Self-Sufficiency programming. CHA is already exploring initiatives with the YWCA's Families Together program; St. Peters Homes, Inc. (see below); Area Mental Health and Urban Ministries who are working on the development of new transitional housing for women. The creation of these links with social services providers in the community is key to the long-term success of the Moving Forward program.

The initiative also meets the goal of achieving greater cost efficiency in Federal expenditures. The Section 9 subsidies available in Charlotte (historically around $250/unit/month) have traditionally not been adequate to cover the operating expenses of larger units. While the new PEL program is designed to address that problem, we still are experiencing operating shortfalls at our larger bedroom developments because in the past few years, subsidies have been funded at levels that are 85% or less of budget. Supportive housing units tend to be smaller and to have a lower per unit operating cost. In addition, they tend to benefit from community fund-raising and support for social services. A Section 9 subsidy that might not be sustainable in a larger family development is sufficient for a smaller supportive housing unit, especially given the additional community support. CHA is committed to returning to full utilization of Section 9 under the statutory cap. One of the most cost-effective ways to do that is through the expansion of efforts to develop smaller supportive housing units that have the additional benefit of community subsidy for social services.

Provider Based Rental Subsidy Program

CHA is seeking approval from HUD to implement a Provider-Based Rental Subsidy Program. The program will provide funding to non-profit partner agencies to subsidize rent amounts throughout the city for participants in their self-sufficiency programs. The "shallow subsidy" will be a set amount based on bedroom size.

Housing First

CHA is continuing to work with Urban Ministries on evaluating sites for implementation of the Housing First model in Charlotte. In second quarter 2008, CHA explored with Urban Ministries and the national nonprofit, Common Ground, whether an existing 191 unit CHA seniors building might be renovated and converted into a Housing First model. Urban Ministries is also looking for sites in

Charlotte for a new 100 unit building specifically designed for Housing First. CHA proposes to partner with Urban Ministries on this new venture. Urban Ministries would include Section 9 rental units in the development and MTW funds may be used as loans/grants. Timing for this development is uncertain as fundraising may be negatively affected by the economic downtown.

In the second year of the MTW program, CHA will continue to focus its efforts on two primary areas:

(1) Expansion of Project-Based Section 8:

Continue the commitment to provide 300 project-based Section 8 subsidies for housing for persons with disabilities: In 2006, the CHA Board approved a commitment to assist in the construction of new units up to a goal of 300 units of housing for persons with disabilities by 2012. This effort dove-tails with a commitment by NCHFA and the Department of Health and Human Services (DHHS) at the state level to provide additional leveraged funding for special needs housing through the state Housing 400 program. Further, CHA will continue to work with developers with experience in providing this specialized housing and may get involved in some joint venture efforts at co-development.

(2) Re-structure and expand McCreesh Place:

St. Peter's Homes, Inc. ("St Peter's Homes"), a non-profit organization in Charlotte dedicated to building affordable housing to alleviate homelessness, owns and operates McCreesh Place. McCreesh Place opened in 2003 as a single room occupancy apartment community which provides full on-site supportive services for its residents. It provides housing to disabled men who were formerly homeless in a 21,000 square foot, 3-story building, with 64 apartment units on 1.15 acres located approximately two miles from center city Charlotte. CHA is working with St. Peter's to add 26 efficiency units to their operation through the tax credit program and also to provide additional Section 8 and Section 9 rental subsidies. CHA will apply to the Mixed Finance Group for approval of this development in the first year of the MTW program.

CHA is the lead on financing involving tax credits, Housing Trust Fund (HTF), Affordable Housing Program (AHP), etc. CHA is considering using full Project Expense Limit (PEL) and capital fund replacement type financing. If approved, financing should be in place by year end 2008 and construction begun in FY09-10.

Statutory Objective

Working with service providers in this context strengthens relationships for their participation in other social service initiatives and provides more housing choices for low income families.

Anticipated Impact
It is anticipated that up to 300 project-based Section 8 vouchers would be made available for housing for persons with disabilities and special needs, which will create an additional 300 housing opportunities. In addition, assisting with financing and developing additional physical units increases the stability of the safety net for families.

Baselines and Benchmarks
The baseline will be set at zero (0) and the staff will keep track of the number and type of projects financed, built or rehabilitated through the Housing for Persons with Disabilities and Special Needs Initiative. The goal is to create an additional 300 housing opportunities.

Data Collection and Metrics
The staff will track the number and type of projects finances, built or rehabilitated through this initiative.

Authorizations
Attachment C-D, #1-4-Operational Policies and Procedures *This authorization waives certain provisions of Section 8(o)(7) of the 1937 Act and 24 C.F.R. 982.162; certain provisions of Sections 8(o)(7)(a), 8(o)(13)(F) and 8(o)(13)(G) of the 1937 Act and 24 C.F.R. 982.303, 982.309 and 983 Subpart F; certain provisions of Section 8(o)(5) of the 1937 Act and 24 C.F.R. 982.516; certain provisions of Section 8(o)(9), of the 1937 Act and 24 C.F.R. 982; certain provisions of Section 8(o)(13) of the 1937 Act and 24 C.F.R. 983;certain provisions of Section 8(p) of the 1937 Act and 24 C.F.R. 983.53-54 and 982 Subparts H and M; and certain provisions of Section 8(r) of the 1937 Act and 24 C.F.R. 982 Subpart H; certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and* 8(o)(13)(H)-(I) *of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.51; certain provisions of Sections 8(o)(7) and 8(o)(13) of the 1937 Act and 24 C.F.R. 982.308, 982.451 and 983 Subpart E; certain provisions of Section 8(o)(10) of the 1937 Act and 24 C.F.R. 982.50;7certain provisions of Sections 8(o)(7) and 8(o)(13)(F)-(G) of the 1937 Act and 24 C.F.R. 982 Subpart L and 983 Subpart E certain provisions of Sections 16(b) and 8(o)(4) of the 1937 Act and 24 C.F.R. 5.603, 5.609, 5.611, 5.628, and 982.21*; and *certain provisions of Sections 8(o)(6), 8(o)(13)(J) and 8(o)(16) of the 1937 Act and 24 C.F.R. 982 Subpart E, 982.305 and 983 Subpart Fall as necessary to implement the Agency's Annual MTW Plan.*

SOURCES AND USES OF FUNDING AND ADMINISTRATIVE

SOURCES AND USES OF FUNDING

A. Consolidated Budget Statement

See Appendix E

B. Planned Sources and Expenditures by development

See Appendix E

C. Description of changes in sources and uses of MTW funding from previously-approved plan

The sources of funding have remained stable utilizing public housing and Section 8 funding. We also included as a source of funding the appropriation of fund balance. In the uses section, we have included the $2 per unit allowable asset management fee from the MTW funds for the Central Office Cost Center. In uses of funding, the transfer to public housing and Section 8 includes money to fund the MTW initiatives. Also more clearly defined are the funding for capital projects at the asset management projects and capital projects for the Real Estate Department for acquisitions and rehabilitations.

D. Description of how funding fungibility is planned to be used, if applicable.

Fungibility has allowed the CHA to utilize funding to meet the needs of the organization. For example the anticipated prorated funding for public housing will not meet the needs of public housing properties. Through fungibility of funds, CHA is able to fund public housing properties at 100% of subsidy, provide more funding to capital projects for the Real Estate Department for additional affordable housing and capital projects to the public housing properties for needed replacements. Finally, fungibility has allowed CHA to fund MTW initiatives in compliance with the MTW Annual Plan. All of those items are evidenced in the Consolidated Budget Statement.

ADMINISTRATIVE

A. The resolution and certifications of the Board of Commissioners are attached in the Appendices. The Charlotte Housing Authority Board of Commissioners approved the submission of the 2009 – 2010 Moving To Work Plan at a Special Board meeting held at 11:45 a.m. on January 14, 2008 at the Charlotte Housing Authority Administrative Office located at 1301 South Boulevard.

B. The Public Hearing was held on December 16, 2008 at 12:00 p.m. prior to the Board of Commissioners Meeting. The Public Hearing was held at the Charlotte Housing Authority Administrative Office located at 1301 South Boulevard. The public comments from the Charlotte Housing Authority's Public Hearing are documented in Appendix C.

C. The Charlotte Housing Authority is designing an ongoing Agency-directed evaluation of the demonstration to be conducted by a third party over the next 10 years of the Agreement to determine effectiveness of the Initiatives. The Authority recognizes that MTW allows the flexibility to create new strategies throughout the agreement period and that the length or stability of these Initiatives may not be certain based on the reports of the third party evaluator.

PHA Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the PHA fiscal year beginning April 1, 2009 hereinafter referred to as" the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

1. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 30 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
2. The Agency took into consideration public and resident comment before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan;
3. The PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
4. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identify any impediments to fair housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.
5. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
6. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
7. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
8. The PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.
9. The PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.
10. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
11. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
12. The PHA will provide HUD or the responsible entity any documentation that the Department needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58.
13. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
14. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
15. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
16. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments) and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments.).
17. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
18. All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its Plan and will continue to be made available at least at the primary business office of the PHA.

Housing Authority of the City of Charlotte
PHA Name

NC003
PHA Number/HA Code

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

Name of Authorized Official	Title
David H. Jones	Board of Commissioners Chairperson
Signature X David H. Jones	Date 1/14/09

form **HUD-50077-MTW**
(01/14/09)

RESOLUTION NO.1643

AUTHORIZE THE HOUSING AUTHORITY OF THE CITY OF CHARLOTTE (CHA) TO SUBMIT THE MOVING TO WORK (MTW) ANNUAL PLAN FOR FISCAL YEAR 2009-2010 TO THE U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT (HUD)

WHEREAS, Moving to Work is a demonstration program authorized by Congress and implemented by the U.S. Department of Housing and Urban Development; and

WHEREAS, in establishing MTW, Congress granted broad authority to housing authorities to design programs that would achieve three primary goals:

- Reduce cost and achieve greater costs effectiveness in Federal expenditures;
- Give incentives to families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient; and
- Increase housing choices for low-income families.

WHEREAS, the MTW agreement provides CHA with the authority to design and test innovative, locally-designed housing and self-sufficiency strategies for low-income families; and

WHEREAS, on December 16, 2008 the CHA Board of Commissioners conducted a public hearing on the FY 2009-2010 MTW Annual Plan plan; and

WHEREAS, CHA certifies that the housing assisted under the demonstration program is safe, decent, sanitary, and in good repair, according to an inspection protocol established or approved by the Secretary; and

WHEREAS, CHA provides certifications and other submissions as required by HUD; and

WHEREAS, CHA is requesting the Board of Commissioners to adopt CHA's FY 2009-2010 MTW Annual Plan and authorize the submission of the FY 2009-2010 MTW Annual Plan to HUD.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Commissioners of the Housing Authority of the City of Charlotte that:

1. All initiatives in the MTW Annual Plan shall be reviewed and approved by the appropriate level of the Board of Commissioners before they are implemented.

2. CHA's FY 2009-2010 MTW Annual Plan is hereby adopted.

3. The Chair of the Board of Commissioners and the Chief Executive Officer are hereby authorized to execute any required documents, certifications or HUD forms related to the approval and filing of CHA's FY 2009-2010 MTW Annual Plan.

4. The Chief Executive Officer is authorized to submit CHA's FY 2009-2010 MTW Annual Plan and such other required documents, certifications or forms to HUD with such changes, additions, corrections or amendments as deemed necessary or appropriate or as may be required by HUD.

5. The Chief Executive Officer is hereby authorized to negotiate with HUD regarding any portion of CHA's FY 2009-2010 MTW Annual Plan and to carry out other actions relating to the plan.

RECORDING OFFICER'S CERTIFICATION

I, Charles Woodyard, the duly appointed Secretary of the Housing Authority of the City of Charlotte, North Carolina, do hereby certify that Resolution No. **1643** was properly adopted at a meeting held January 14, 2009.

(SEAL)

BY: Charles Woodyard

Charles Woodyard
Secretary

DISCLOSURE OF LOBBYING ACTIVITIES

Approved by OMB
0348-0046

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

1. Type of Federal Action:	2. Status of Federal Action:	3. Report Type:
[a.] a. contract b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	[NA] a. bid/offer/application b. initial award c. post-award	[a.] a. initial filing b. material change **For Material Change Only:** year _____ quarter _____ date of last report _____

4. Name and Address of Reporting Entity:	5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:
☐ Prime ☐ Subawardee Tier _____, *if known*: **Congressional District**, *if known*: 4c	N/A **Congressional District**, *if known*:
6. Federal Department/Agency: U.S. Department of Housing and Urban Development	**7. Federal Program Name/Description:** CFDA Number, *if applicable*: _____
8. Federal Action Number, *if known*:	**9. Award Amount**, *if known*: $ N/A
10. a. Name and Address of Lobbying Registrant (*if individual, last name, first name, MI*):	**b. Individuals Performing Services** (*including address if different from No. 10a*) (*last name, first name, MI*):

11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

Signature: Charles Woodyard
Print Name: Charles Woodyard
Title: Chief Executive Officer
Telephone No.: 704.336.5221 Date: 1/14/09

Federal Use Only:

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Standard Form LLL (Rev. 7-97)

Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Applicant Name

Housing Authority of the City of Charlotte

Program/Activity Receiving Federal Grant Funding

Moving To Work Demonstration Program

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

(1) The dangers of drug abuse in the workplace;

(2) The Applicant's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

(1) Abide by the terms of the statement; and

(2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federalagency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;

f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---

(1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or

(2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

2. **Sites for Work Performance.** The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

Check here [ ] if there are workplaces on file that are not identified on the attached sheets.

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

Name of Authorized Official	Title
Charles Woodyard	Chief Executive Officer
Signature: x Charles Woodyard	Date 1/14/09

form **HUD-50070** (3/98)
ref. Handbooks 7417.1, 7475.13, 7485.1 & .3

APPENDIX C

PUBLIC HEARING/RESIDENT COMMENTS DOCUMENTATION

MINUTES OF THE REGULAR BOARD MEETING OF THE COMMISSIONERS' OF THE HOUSING AUTHORITY OF THE CITY OF CHARLOTTE HELD ON TUESDAY, DECEMBER 16, 2008

The Board of Commissioners of the Housing Authority of the City of Charlotte, North Carolina held a regular meeting at the ***Charlotte Housing Authority, 1301 South Boulevard, Charlotte, NC 28236*** at 12 noon on December 16, 2008.

Present: ***Chairman David Jones***
Vice-Chairman Rodney Moore
Commissioner Montega Everett
Commissioner Joel Ford
Commissioner Chris Moffat
Commissioner Dan Page
Commissioner Will Miller

Absent: Sherrod Banks, General Counsel

Also Present: Charles Woodyard

I. Purpose of the Public Hearing:

The purpose of the public hearing is to conclude a 45 day public review and comment period for the Housing Authorities fiscal year 2009 – 2010 MTW Annual Plan before the plan can be submitted to the Department of Housing and Urban Development.

II. Opening Remarks:

Chairman Jones stated that our first order of business is to hold a public hearing on the 2009-2010 Annual Plan for the MTW project. The purpose of the MTW demonstration program is to give participating public housing authorities, like the Charlotte Housing Authority, the flexibility to design and test innovative approaches for providing and administering housing assistance and accomplish three primary goals which are to achieve programmatic efficiency and reduce cost to promote self-sufficiency among assisted families and increase housing choices for low income households.

MTW housing authorities are required to submit an Annual Plan that describes its goals and objectives for the coming year. New initiatives in our plan this year include Resident Safety improvements for our senior and family sites, Rent Reform and a related work requirement, reintroducing our Currents of Change

Program, which is designed to serve as a support system for the work requirement, and a subsidy program that will include the provision of vouchers to non-profit partner agencies who will use the vouchers to rent units throughout the city for participants in self-sufficiency programs.

During the development of this Annual Plan, the Authority staff met with residents in twelve (12) of the public housing communities and held informational meetings for Section 8 participants. Additionally, announcements were sent in all of the public housing monthly newsletters. Staff has received additional feedback through MTW suggestion boxes that were placed at all of our conventional sites, as well as in the lobby of the Section 8 Administrative Office. Notices regarding the plan were included with December rent invoices that were mailed in November. The plans initiatives were discussed at the Client Relations Committee meeting on November 5, 2008. Also, staff has met with the Resident Advisory Council leaders several times to discuss the plan and receive feedback.

The plan was made available for public viewing on November 1, 2008. Copies of the plan were placed at the main branch of the Charlotte Public Library, City Hall, all CHA managed properties and our administrative offices located at 1301 South Boulevard, 2600 Youngblood Street and 135 Scaleybark Road. Chairman Jones opened the hearing for public comments. He requested that all speakers state their name and address for the record.

III. <u>Call for Public Comments:</u>

The first speaker was: Mr. Ted Fillette, Senior Managing Attorney, Legal Aide of North Carolina, 1431 Elizabeth Avenue, Charlotte NC. He distributed handouts to the Board. Mr. Fillette stated that he has generally reviewed the proposal and he thinks that the goal to promote work and self sufficiency are admirable and a worthwhile goal. However, he was present to talk about some of the difficulties of achieving these goals in the manner in which the proposal was written and that there would be some speakers following that would talk about some suggestions regarding dependable and fair methods.

He called attention to some of the factors that will affect the ability of the Housing Authority to carry out the plan as it is proposed. He was present at the Client Relations Committee meeting in June 2008 when there was a report about some of the conditions affecting the client community and at that time he made some notes about the survey results that were received. One important fact was that 32% of the public housing tenants, outside of the family self-sufficiency program have zero income. That is something that he thinks is an indicator that there are a substantial number of folks in public housing that will be impacted by this proposal. The Housing Authority's proposal talks about pursuing the

partnerships with the service providers that need to help make this work. This includes employment services, vocational training, education, community college, child care and so forth. In the material distributed to the Board, it will reflect some of the challenges for these community partners. There is an article from December 7th stating the status of unemployment in Charlotte now. He noted that things could improve a lot in the next twelve months and we (Legal Aid) hope that it will; however, presently there are 61,000 unemployed folks in the Charlotte region now.

There is not a definition of what is disabled in the Plan and he would submit to that if the housing authority took the government definition or findings of government eligibility for disability CHA would be missing a lot of people who are disabled in fact, but haven't been able for one reason or another to qualify for a disability program that gives them some income; a lot has to do with mental health challenges. Some folks are not capable of even proving that they are disabled and that will be a significant challenge in the population that is subject to this program. The work requirements in this proposal will relate to the non-elderly and the non- disabled. They don't have jobs, and they also have not qualified for any disability program. He is very concerned about how this proposal is going to work for them and what a real challenge it will be.

The most important challenge is how to deal with the sanctions when people are not able to obtain or keep work. If CHA looks carefully at the plan it basically says, people are subject to sanctions for failure to reach part-time or full time work by the deadlines listed. There will be two counseling sessions with a 90 day grace period but the key language is: if the participant has failed to obtain the required number of hours at the end of the grace period he/she will be considered in non-compliance and that is an absolute requirement. It does not state that efforts were made, it just states that he/she could not/did not do it. This is when the sanctions kick in and he/she began to lose the subsidy, which means the ability to pay the rent. Think about what that means for 1/3 of the tenants that now have no income. He suggested that we create an employability panel to help CHA administer this portion of the program. The panel would consist of volunteer or community partners. He does not have authority to speak for any of these organizations, this is a concept and CHA will see the concept in writing when the representative from the Homeless Services Network distributes her proposal.

The idea is to have this panel help formulate the standards to determine whether someone is employable under the circumstances and to hear cases on those deemed non-compliant.

Regular Board Meeting
December 12, 2008

The second speaker was: Carol Hardison, Crisis Assistance Ministry, 500-A Spratt Street, Charlotte, 28206. She thanked staff concerning the decision to house homeless CMS families in Hall House. She remarked that it demonstrated a very innovative way to do something positive. She has enjoyed working with staff and the Board this year and knows there is a lot more work to do in the future. She does applaud CHA in the efforts stated in the Plan and noted she just wants to reach out and partner with CHA.

She felt that the Charlotte Housing Authority is the ultimate safety net in this community for the families that are the poorest of the poor, in many situations through no fault of their own. They have worked very hard; however, have not been able to have that stability that they deserve. If the safety net fails, Charlotte has one last resort and that is the "emergency room" and that is what the Crisis Assistance Ministry is in this community. The last thing the Charlotte community wants to do is to strengthen or weaken the safety net and strengthen or weaken the emergency room and have them to be counter to one another. Therefore, as CHA implement this Plan, make sure and watch the impact on Crisis Ministry to insure that we don't end up spending more and more dollars on top of the dollars we are already paying in the community to help people with emergency financial assistance.

Presently, Crisis is already providing an abundance of assistance to the Charlotte Housing Authority residents, either direct payment to the authority for rent or to utility companies. The families that come to Crisis Assistance are working hard; unfortunately, they are spending 70% - 80% of their income in housing or utilities. This does not leave a lot remaining for daycare, transportation, food, medicine, etc. Daycare and transportation options are eating up remaining income for persons earning $7 – 9 an hour. A large amount of families often have to make the choice between going back to work and having a place for their children to be. She repeated that she is very excited about the new partnership. In conclusion, she emphasized that CHA be very careful and continue to work together in a program like this so that it does not further increase the size of our emergency room.

The third speaker was: Roxianna Johnson, 2009 Chairperson Elect, Homeless Service Network, 429 Billingsley Rd., Charlotte, NC. The Homeless Service Network (HSN) has been in existence for a little over 15 years. It is a body of 32 agencies throughout the community that is primarily faith based, non-profit and governmental entities. The HSN providers provide a variety of services to the homeless community to help people make improvements within their lives. Some of the agencies that are members of HSN are: Salvation Army, Uptown Men's Shelter, Area Mental Health and the Charlotte Housing Authority.

The HSN is also an endorser of the 10 year plan to end homelessness and also the lead agency for the Mecklenburg County Continuum of Care, which is part of the Homeless Assisted Program that is operated through HUD. Ms. Johnson distributed information to the Board. The HSN has received materials from the Charlotte Housing Authority regarding its proposed MTW or making work pay program. One of the member agencies has provided an analysis of the drafted proposal as well as a set of recommendations. The analysis was shared with the entire HSN with an opportunity for comments. The HSN executive committee reviewed the analysis and made recommendations on December 11, 2008. They approved forwarding the recommendations to the Charlotte Housing Authority as a part of the public comment to the proposal on December 16, 2008.

The recommendation includes an establishment of a collaborative body known as the Employability Advisory Panel. Its initial task would be to formulate standards for tenants and reasonable efforts to obtain and maintain employment. Those standards would focus on skills, physical health, mental health and other personal factors that affect the tenant's employability, as well as the actual availability of the support elements such as affordable daycare and transportation. Once the panel establishes those reasonable standards it could also serve as the independent review panel for tenants the Charlotte Housing Authority finds to be in default and subject to sanctions. The panel would conduct informal hearings to determine, based on its standards, whether the tenant has not made all of the appropriate efforts and whether they had the necessary support to be employable. At the discretion of the panel we could fashion appropriate remedies in individual cases. This panel could be composed of Executive Directors or their designees of Crisis Assistance Ministries, Goodwill Industries, Area Mental Health, and Urban League and a volunteer lawyer from the firm of Ferguson & Stein. They would appreciate any consideration for this recommendation. Currently, there is an ongoing history of collaboration in the community and we would like to encourage that continuation.

Vice-Chairman Moore asked if there was any particular reason why Ferguson, Stein & Chambers Law Firm was chosen as a possible law firm. Ms. Johnson responded that, it was primarily because they have a history of knowing the population and being an advocate for the population.

Ms. Lucille Puckett, Resident, 2600 Bellefonte Street, CHA Dillehay Courts Apartment Community. Ms. Puckett stated that the MTW (Moving-to-Work) is not all bad, but she thinks that at a time when the economy is down and we are in a recession, we should look at what we're considering very carefully. She supports Ted Fillette, Carol Haridison, and Roxie Johnson on the things they were saying because everything being said is so true. She referenced a newspaper article in hand, from the Charlotte Observer, explaining a fundraiser

held by Ms. Cynthia Morrison, President of AT&T, which referenced a Charlotte Housing Authority resident that is doing all she can to provide for her family. The resident used to work a 40 hours/week job for 11 years with a company making $8.00/per hour, however, her hours have been cut substantially. This particular client was working before the MTW requirements were in place and she currently lives in public housing on the East side of town. Ms. Puckett asked that all read the article at their leisure.

She also had another article that spoke about the North Carolina job market bleak outlook. According to the statistics presented by Ms. Puckett, we have lost 96,000 jobs in 2008-2009 and under the MTW plan the residents would have to get jobs in a downturned economy. In a downturned economy the work requirement of the MTW initiative may not be possible and this could increase the homelessness rate, and DSS (Department of Social Services) case loads. Ms Puckett also discussed her personal condition in which she has medical bills for 3 children, but if she works, she will lose benefits and have to pay it herself and not be able to afford rent.

In conclusion, she stated that we should take into consideration when making this decision today of how it will impact families, children and lives long after each and every one of us are long gone. Once again she urged that we take careful consideration when we are evaluating the policies in place.

IV. <u>Close Public Hearing:</u>

Chairman Jones asked if there was anyone else present that would like to comment on the MTW plan. Hearing none, it was noted that the Board will have a discussion of the MTW plan as the last agenda item in today's meeting and he welcomed all to stay; however no interruptions would be welcomed during this session. All interested were invited to stay and listen to the deliberation. It was noted that this is a dynamic plan, it will change annually, and we have to start somewhere. It may not be a perfect starting point, but just because we start at a particular set of goals/requirements does not necessarily mean that there will be the same goals and requirements in next year's plan. It is not the intention of the Board to put this in stone for the next ten years. If we are making some assumptions that may not be true or turn out to be difficult, then it is certainly the responsibility on all to come back and remind us of that and assume that we will exercise our ability to make changes as changes are needed.

Minutes respectfully prepared by: Barbara G. Porter
Executive Assistant to the CEO

APPENDIX D

Originally Adopted Budget for FY 07-08

REVENUE:	April 2007 - March 2008
Public Housing Operating Subsidy	10,852,144
Section 8 HAP Subsidy	40,659,997
Section 8 Administrative Fees	2,293,159
Capital Fund	4,915,755
TOTAL REVENUE:	58,721,055
EXPENSES:	
Public Housing Expense	10,852,144
Section 8 Expense	42,953,156
Capital Fund Expense	4,915,755
TOTAL EXPENSES:	58,721,055

APPENDIX D

The table below shows the originally adopted budget for FY 08 – 09 and Board approved revisions through September 2008.

	APRIL 2008-MARCH 2009	APRIL 2008-MARCH 2009
REVENUE	**BUDGET**	**REVISED**
Public Housing Operating Subsidy	13,496,225	9,837,846
Section 8 HAP Subsidy	39,540,611	37,167,683
Section 8 Administrative Fees	2,310,909	2,343,223
Capital Fund	4,915,755	5,338,972
Replacement Housing Factor #1	-	290,100
Replacement Housing Factor #2	-	302,576
Interest Income	-	335,000
Total MTW Income	**60,263,500**	**55,615,400**
Other Sources of Funds		
Appropriate Fund Balance - MTW Funds	-	14,532,781
Total Other Sources	-	**14,532,781**
TOTAL REVENUE	**60,263,500**	**70,148,181**
EXPENSES:		
Administrative:	154,292	997,782
Implementation of MTW Initiatives:	12,403,681	5,931,648
Capitalized Items	-	65,000
TOTAL OPERATING EXPENSES BEFORE OTHER ITEMS:	**12,557,973**	**6,994,430**
Other Items:		
Operating Transfers Out - Public Housing	14,622,223	13,559,417
Transfer Out - Capital Projects		16,453,750
Operating Transfers Out - Section 8	33,083,304	33,140,584
Total Other Items	**47,705,527**	**63,153,751**
TOTAL EXPENSES:	**60,263,500**	**70,148,181**

CONSOLIDATED BUDGET
SOURCES & USES

The Operating Budgets for the fiscal year 2009-2010 for the Charlotte Housing Authority are based on 1) the priorities set by the Board, 2) the Mission of the Housing Authority 3) our strategic goals 4) HUD's directive for project based management, accounting and budgeting and 5) the Moving To Work Agreement.

MISSION

The Charlotte Housing Authority is a non-profit real estate holding company with a public purpose. That public purpose is to provide decent, safe and affordable housing to low and moderate-income families while supporting their efforts to achieve self-sufficiency.

Strategic Goals

In order to accomplish our vision and mission, the following strategic goals have been established to transform the Authority into the type of real estate entity that more effectively meets the community's needs.

Strategic Goal #1: Lead the development of collaborative relationships for affordable housing solutions to a broad continuum of stakeholders.

Strategic Goal #2: Maximize the economic, physical, and social value of our real estate portfolio.

Strategic Goal #3: Ensure that the Authority attains long-term financial viability.

Strategic Goal #4: Provide the highest quality, most cost-effective real estate management services which exceed HUD and industry standards.

Strategic Goal #5: Create an environment that facilitates the development of client families to reach their highest potential.

In the following section, the consolidated budget for the Charlotte Housing Authority is presented. This consolidated budget is broken down into its major funds, then finally the presentation of each asset management project.

SOURCES OF FUNDS

The full Moving To Work (MTW) agreement was approved and signed by HUD in December 2007. Under the single fund budget with full flexibility all funds from HUD, Public Housing - Section 9, Section 8 and the Capital Fund are combined as MTW funding. Money is then transferred from the MTW fund to cover all eligible cost under Section 8, Section 9 and the Capital fund. In some funds other income may be shown such as late fees, non dwelling rental income, or fraud recovery.

USES OF FUNDS

The uses of funds in many aspects are the same for the funds. The uses are broken down by major categories- administrative, tenant and social services, utilities, maintenance, protective services and general. There are 216.3 budgeted positions for the 2009-2010 fiscal year. In 2008-2009, total budgeted positions were 195.3 and during the year eleven (11) positions were added. For 2009-2010 ten (10) positions have been added. The increase in staff is most prominent in the Operations area with the addition of 8 staff members in 2008-2009 and 10 staff members in 2009-2010. This increase in staff was necessary to adequately staff the Authority.

Administrative represents those expenditures for salaries/benefits for central office, site managers and Section 8 staff and other sundry expenditures - telephones, office supplies and training.

Tenant and Social Services represents those cost associated with staff that provides case management to our residents. Those costs also include salary/benefits, sundry expenditures - relocation cost as well as tenant education.

Utilities represent the cost of all utilities including water/sewer, electricity and gas.

Maintenance represents all cost associated with maintenance of the properties. Staff salaries, materials and outside contract services such a pest control and lawn care.

Protective Services represents all cost associated with security for the CHA.

Other General represents those costs for insurance- auto and property, PILOT and bad debt.

CONSOLIDATED BUDGET

EXHIBIT A.1

SOURCES OF FUNDS	April 2009 - March 2010
Public Housing Operating Subsidy	11,006,553
Section 8 HAP Subsidy	40,169,002
Section 8 Administrative Fees	2,423,639
Tenant Rental Revenue	6,630,491
Total Other Resident Income - Late Fees, Excess Utilities	356,427
Other Revenue -Cable, Antenna, Vending	63,347
Public Housing Revenues - COCC	1,900,155
Section 8 Fees - COCC	998,712
Horizon Development Property, Inc. Fees	352,956
Hoefener Fees - COCC	39,612
Relocation Fees - COCC	835,704
Maintenance Operations Revenue - COCC	585,767
Bond Issuance Fees - COCC	145,000
MTW Management Fee - COCC	176,280
Mixed Financed Fees – COCC	93,720
Capital Fund Fees – COCC	533,897
Investment Income – COCC	43,000
Administrative Fees - Portables	175,000
Interest Income - Section 8	357,457
Fraud Recovery - Section 8	50,000
Miscellaneous Other Revenue	3,921,595
Non Dwelling Rent	202,500
Developer Fees Earned – Horizon Acquisition	170,461
Total Operating Revenue	**71,231,275**
Other Sources:	
Operating Transfer In - Other	766,551
Operating Transfer In – Horizon Development Properties, Inc.	145,000
Fund Balance Appropriated	16,848,960
Total Other Sources	**17,760,511**
TOTAL SOURCES OF FUNDS:	**88,991,786**

EXHIBIT A.2

USES OF FUNDS	
Administrative:	15,619,106
Tenant and Social Services:	6,187,485
Utilities:	4,189,676
Ordinary Maintenance and Operation:	7,471,156
Housing Assistance Payments	28,800,000
Protective Services	1,493,975
General Expenditures:	2,732,390
Capitalized Items:	936,450
Total Expenditures Before Other Items	**67,430,238**
Other Items:	
Capital Projects – AMPS	6,024,063
Capital Projects – Real Estate	13,713,271
Operating Transfer Out – Horizon Development Properties, Inc.	145,000
Transfer Out – Mixed Finance Communities	1,679,213
Total Other Items	**21,561,547**
TOTAL USES OF FUNDS	**88,991,786**

NOTE

The sum of the individual funds for sources and uses (Exhibits B–I) will not tie directly to the consolidated report (Exhibits A.1 and A.2) due to such items as operating transfers.

Appendix E

MOVING TO WORK

All funds are consolidated within the MTW fund and transferred to each of the major funds. The expenditures in this fund represent those for the MTW Coordinator and those associated with implementing other MTW initiatives. MTW funds are transferred to the asset management projects for operating subsidy, capital needs and MTW initiatives. Funds are transferred to Section 8 for the operation of the Section 8 program. MTW funds are shown in the Capital Project transfer line item for acquisitions and rehabs for the Real Estate Department.

EXHIBIT B

MTW FUNDS

SOURCES OF FUNDS	April 2009- March 2010
Public Housing Operating Subsidy	11,006,553
Section 8 HAP Subsidy	40,169,002
Section 8 Administrative Fees	2,423,639
Other Income	347,457
Total Operating Revenue	**53,946,651**
Other Sources:	
Fund Balance Appropriated	16,812,047
Total Other Sources	**16,812,047**
TOTAL SOURCES OF FUNDS	**70,758,698**
USES OF FUNDS	
Administrative:	923,013
Tenant and Social Services:	176,280
TOTAL OPERATING EXPENDITURES:	**1,099,293**
Other Items:	
Operating Transfers Out - Public Housing	15,917,533
Operating Transfers Out - Section 8	34,004,538
Capital Projects - AMPs	6,024,063
Capital Projects - Real Estate	13,713,271
Total Other Items	**69,659,405**
TOTAL EXPENDITURES:	**70,758,698**

Appendix E

CENTRAL OFFICE COST CENTER (COCC)

The Central Office Cost Center (COCC) is composed of those departments that provide overall leadership and administrative support for the organization as a whole, as well as asset management oversight for the organization.

Revenues for the COCC are derived from fees charged to other areas such as Public Housing, Section 8 and the Capital Fund as dictated by the asset management rules and regulations. Fees were also charged to the Real Estate Department, the Carol Hoefener Center, those properties owned by the CHA's nonprofit affiliate, Horizon Development Properties, Inc. and fees from the mixed financed communities. As part of the COCC, the CHA has incorporated a City Relocation Program which provides permanent housing solutions for families displaced due to their home being condemned by the City of Charlotte Code Enforcement Department and Fire Department. Total revenue for the COCC is $5.9 million which is an increase of 2.5% over last year.

Specific areas within the COCC are the chief executive office, chief operations office, asset management, regional property management, fleet management, finance, accounting, procurement, human resources, information technology, city relocation and capital fund administration. Approximately 24.7% of CHA employees work within the COCC.

The Other Uses represents bond issuance fees to be transferred to Horizon Development Properties, Inc. The maintenance expenditure category represents centralized maintenance services such as bulk trash, plumbing and locksmith services.

EXHIBIT C

CENTRAL OFFICE COST CENTER

SOURCES OF FUNDS	April 2009- March 2010
Public Housing Fees	1,900,155
Section 8 Fees	998,712
Horizon Fees	352,956
Capital Fund Fees	533,897
Hoefener Fees	39,612
Mixed Finance Fees	93,720
Relocation Income	835,704
Maintenance Operations	585,767
Bond Issuance Fees	145,000
Investment Income	43,000
MTW Management Fee	176,280
Other Income	288,409
Total Operating Revenue	**5,993,212**
TOTAL SOURCES OF FUNDS	**5,993,212**
USES OF FUNDS	
Administrative	4,413,487
Tenant and Social Services	630,790
Utilities	56,300
Maintenance	540,459
Other General and Administrative	172,077
Capitalized Items	35,100
Total Operating Expenditures	**5,848,213**
Other Items:	
Operating Transfer Out - Horizon Development	145,000
Total Other Items	**145,000**
TOTAL USES OF FUNDS	**5,993,213**

Appendix E

ASSET MANAGEMENT PROJECTS

The CHA has 23 properties that are self managed and 34 asset management projects (AMPs). Budgets are prepared by site managers, as they are responsible for the financial viability of each of their properties. Each property within the AMP is funded at 100% of subsidy. Net tenant rental income is projected to be $4.52 million. Other revenue consisting of late fees, excess utilities, vending machine, cable, energy conservation savings and antenna revenue. Total revenue is $24.1 million for 3,041 units.

Of CHA's 216.3 budgeted employees for 2009-2010, 47.5% work in the public housing sector. This includes those who work directly at the site and those who provide supportive services to our clients.

EXHIBIT D

ASSET MANAGEMENT PROJECTS

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	4,520,473
Other Revenue	1,934,196
Total Operating Revenues	**6,454,669**
Other Sources:	
Operating Transfers In - First Ward Interest	305,301
Operating Transfers In - Other	461,250
Operating Transfers In - MTW	15,917,533
Inter-AMP Excess Cash Transfer In	1,015,284
Total Other Sources:	**17,699,368**
TOTAL REVENUE:	**24,154,035**
USES OF FUNDS	
Administrative:	4,251,238
Tenant and Social Services:	3,545,230
Utilities:	3,728,669
Ordinary Maintenance and Operation:	5,813,804
Protective Services	1,297,150
General Expenditures:	1,922,098
Capitalized Items:	901,350
Total Expenditures Before Other Items	**21,459,539**
Other Items:	
Inter-AMP Excess Cash Transfer Out	1,015,284
Transfer Out - Mixed Finance Communities	1,679,213
Total Other Items	**2,694,497**
TOTAL USES OF FUNDS	**24,154,035**

SECTION 8

Revenues for the Section 8 program are primarily a transfer of funds from the MTW fund to fully fund the Section 8 program. Of this amount, $28.8 million of the revenue is dedicated to housing assistance subsidy for 4,268 Housing Choice Vouchers. The Section 8 program has revenue of a lesser extent from portable administrative fees, interest income and fraud recovery.

Approximately 83.8% of the expenditure for the Section 8 program is in housing assistance payments. Approximately 19.5% of the employees of the CHA work in this program.
The non dwelling equipment represents the purchase of new vehicles. Protective Services includes staff that investigates fraud, and we have increased protective services by one employee.

EXHIBIT E

SECTION 8

SOURCES OF FUNDS	April 2009-March 2010
Administrative Fees - Portables	175,000
Interest Income	10,000
Fraud Recovery	50,000
Other	107,600
Total Operating Revenue	**342,600**
Other Sources:	
Operating Transfer In - MTW	34,004,538
Total Other Sources	**34,004,538**
TOTAL SOURCES OF FUNDS	**34,347,138**
USES OF FUNDS	
Administrative:	3,753,956
Tenant and Social Services:	1,508,158
Ordinary Maintenance and Operation:	58,750
Housing Assistance Payments	28,800,000
Protective Services	196,825
General Expenditures:	29,448
Total Operating Expenditures	**34,347,138**
TOTAL USES OF FUNDS	**34,347,138**

HORIZON DEVELOPMENT PROPERTIES, INC.

Horizon Development Properties, Inc. (Horizon) is comprised of properties not financed by HUD funds and the operations of the Real Estate Development area. The Real Estate Development area exists to provide the maximum number of high quality mixed income units that serve our target market and promote economic integration. In addition, this group repositions existing assets and seeks other development opportunities that are economically self-supporting.

Revenues for this group are mainly from tenant rental revenue for 8 properties in the amount of $2.1 million. One of the properties in this group has project-based Section 8 and receives subsidies of $256,344. Other miscellaneous revenue includes disposition fees and developer fees for the Real Estate group and other revenue such as late fees and court fees.

The expenditures for Horizon are derived from properties managed by CHA staff, properties managed by private managers, and from staff of the Real Estate Development Department. The Administrative expenditures are mainly attributable to the Real Estate Development Department.

EXHIBIT F

HORIZON DEVELOPMENT PROPERTIES, INC.

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	2,130,322
Miscellaneous Other Revenue	1,902,320
Total Operating Revenue	**4,032,642**
Other Sources:	
Operating Transfer In - COCC	145,000
Operating Transfer In - Horizon Development	23,779
Total Other Sources	**168,779**
TOTAL SOURCES OF FUNDS	**4,201,421**
USES OF FUNDS	
Administrative:	2,021,208
Tenant and Social Services:	267,415
Utilities:	333,463
Ordinary Maintenance and Operation:	961,105
General Expenditures:	594,451
Total Operating Expenditures Before Other Items	**4,177,642**
Other Items:	
Operating Transfers Out-Horizon Development	23,779
Total Other Items	**23,779**
TOTAL USES OF FUNDS	**4,201,421**

Appendix E

CAROL HOEFENER CENTER

The Carol Hoefener Center is a stand alone community services center funded originally through HOPE VI funds. Revenues for this center are derived from rental of space for offices, special events and programs. Total Other Sources is fund balance appropriated. Total revenue and other sources for the center is $302,953.

The Carol Hoefener Center represents less than 1% of CHA total expenditures. The community services center has two employees which are primarily responsible for the management of the facility.

EXHIBIT G

CAROL HOEFENER CENTER	
SOURCES OF FUNDS	**April 2009-March 2010**
Miscellaneous Other Revenue	266,040
Total Operating Revenue	**266,040**
Other Sources:	
Fund Balance Appropriated	36,913
Total Other Sources	**36,913**
TOTAL SOURCES OF FUNDS	**302,953**
USES OF FUNDS	
Administrative:	80,743
Tenant and Social Services:	39,612
Utilities:	71,244
Ordinary Maintenance and Operation:	97,038
General Expenditures:	14,316
Total Operating Expenditures	**302,953**
TOTAL USES OF FUNDS	**302,953**

Appendix E

HORIZON ACQUISITION CORPORATION

Horizon Acquisition Corporation is composed of transactions that must go through a taxable corporation for CHA's new projects to be adequately funded. This entity is typically handling a pass through process and is budgeted as such.

EXHIBIT H

HORIZON ACQUISITION CORPORATION

SOURCES OF FUNDS	April 2009-March 2010
Developer Fees Earned	170,461
TOTAL SOURCES OF FUNDS	**170,461**
USES OF FUNDS	
Administrative:	170,461
TOTAL USES OF FUNDS	**170,461**

Appendix E

C.O.R.E. PROGRAMS, INC.

C.O.R.E. Programs Inc. (CORE) is a non-profit corporation created to assist residents of public housing facilities in Charlotte and Mecklenburg County in achieving economic independence. CORE is a wholly owned entity of the Authority. It has no employees, and all functions are provided by employees of the Authority and then recorded in the appropriate entity. The Authority's Board of Commissioners also serves as the Board for CORE.

Revenue and expenditures represent those costs associated with the C.O.R.E. Programs Inc. tax return and expenditures associated with spending for the grant from Wal-Mart for public housing residents.

EXHIBIT I

C.O.R.E Programs, Inc.

SOURCES OF FUNDS	April 2009-March 2010
Other Income	25,000
TOTAL SOURCES OF FUNDS	**25,000**
USES OF FUNDS	
Administrative:	5,000
Tenant and Social Services:	20,000
TOTAL USES OF FUNDS	**25,000**

Appendix E

ASSET MANAGEMENT PROJECTS

EXHIBIT J

ASSET MANAGEMENT PROJECTS

BOULEVARD

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	504,000
Other Resident Income i.e. Late Fees, Excess Utilities	95,304
Other Revenue - Cable, Antenna, Vending	125,814
Total Operating Revenues	**725,118**
Other Sources:	
Operating Transfer In - MTW	2,527,887
Total Other Sources:	**2,527,887**
TOTAL SOURCES OF FUNDS:	**3,253,005**
USES OF FUNDS	
Administrative:	541,874
Tenant and Social Services:	328,817
Utilities:	686,398
Ordinary Maintenance and Operation:	782,969
Protective Services:	383,912
General Expenditures:	262,240
Total Operating Expenditures	**2,986,210**
Other Items:	
Inter-AMP Excess Cash Transfer Out	266,795
Total Other Items	**266,795**
TOTAL USES OF FUNDS	**3,253,005**

EXHIBIT K

ASSET MANAGEMENT PROJECTS

DILLEYHAY

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	225,804
Other Resident Income i.e. Late Fees, Excess Utilities	29,820
Other Revenue - Cable, Antenna, Vending	38,889
Total Operating Revenues	**294,513**
Other Sources:	
Inter-AMP Excess Cash Transfer In	6,894
Operating Transfer In - MTW	1,381,207
Total Other Sources:	**1,388,101**
TOTAL SOURCES OF FUNDS	**1,682,613**
USES OF FUNDS	
Administrative:	278,816
Tenant and Social Services:	148,039
Utilities:	325,933
Ordinary Maintenance and Operation:	482,229
Protective Services	64,939
General Expenditures:	31,158
Capitalized Items	351,500
Total Expenditures Before Other Items	**1,682,614**
TOTAL USES OF FUNDS	**1,682,614**

EXHIBIT L

ASSET MANAGEMENT PROJECTS

CHARLOTTETOWN

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	403,452
Other Resident Income i.e. Late Fees, Excess Utilities	10,938
Other Revenue - Cable, Antenna, Vending	91,656
Total Operating Revenues	**506,046**
Other Sources:	
Inter-AMP Excess Cash Transfer In	117,422
Operating Transfer In - MTW	690,415
Total Other Sources:	**807,837**
TOTAL SOURCES OF FUNDS	**1,313,883**
USES OF FUNDS	
Administrative:	323,873
Tenant and Social Services:	149,260
Utilities:	157,249
Ordinary Maintenance and Operation:	409,733
Protective Services	96,089
General Expenditures:	85,679
Capitalized Items:	92,000
Total Expenditures Before Other Items	**1,313,883**
TOTAL USES OF FUNDS	**1,313,883**

EXHIBIT M

ASSET MANAGEMENT PROJECTS

EDWIN TOWERS

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	428,400
Other Resident Income i.e. Late Fees, Excess Utilities	3,856
Other Revenue - Cable, Antenna, Vending	98,776
Total Operating Revenues	**531,032**
Other Sources:	
Inter-AMP Excess Cash Transfer In	93,967
Operating Transfer In - MTW	610,955
Total Other Sources:	**704,922**
TOTAL SOURCES OF FUNDS	**1,235,954**
USES OF FUNDS	
Administrative:	301,468
Tenant and Social Services:	131,426
Utilities:	220,771
Ordinary Maintenance and Operation:	433,723
Protective Services:	72,526
General Expenditures:	76,040
Total Expenditures Before Other Items	**1,235,954**
TOTAL USES OF FUNDS	**1,235,954**

EXHIBIT N

ASSET MANAGEMENT PROJECTS

SOUTHSIDE

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	605,208
Other Resident Income i.e. Late Fees, Excess Utilities	74,880
Other Revenue - Cable, Antenna, Vending	178,493
Total Operating Revenues	**858,581**
Other Sources:	
Operating Transfer In - MTW	2,418,718
Total Other Sources:	**2,418,718**
TOTAL SOURCES OF FUNDS	**3,277,299**
USES OF FUNDS	
Administrative:	610,887
Tenant and Social Services:	427,030
Utilities:	566,223
Ordinary Maintenance and Operation:	671,362
Protective Services:	106,574
General Expenditures:	362,041
Total Expenditures Before Other Items	**2,744,116**
Other Items:	
Inter-AMP Excess Cash Transfer Out	533,183
Total Other Items	**533,183**
TOTAL USES OF FUNDS	**3,277,299**

EXHIBIT O

ASSET MANAGEMENT PROJECTS

STRAWN

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	722,760
Other Resident Income i.e. Late Fees, Excess Utilities	7,884
Other Revenue - Cable, Antenna, Vending	192,999
Total Operating Revenues	**923,643**
Other Sources:	
Operating Transfer In - MTW	1,107,815
Total Other Sources:	**1,107,815**
TOTAL SOURCES OF FUNDS	**2,031,458**
USES OF FUNDS	
Administrative:	515,438
Tenant and Social Services:	227,972
Utilities:	276,487
Ordinary Maintenance and Operation:	528,199
Protective Services:	131,747
General Expenditures:	198,781
Capitalized Item	42,000
Total Expenditures Before Other Items	**1,920,624**
Other Items:	
Inter-AMP Excess Cash Transfer Out	110,834
Total Other Items	**110,834**
TOTAL USES OF FUNDS	**2,031,458**

EXHIBIT P

ASSET MANAGEMENT PROJECTS

PARKTOWNE

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	393,600
Other Resident Income i.e. Late Fees, Excess Utilities	5,016
Other Revenue - Cable, Antenna, Vending	77,493
Total Operating Revenues	**476,109**
Other Sources:	
Inter-AMP Excess Cash Transfer In	53,474
Operating Transfer In - MTW	513,419
Total Other Sources:	**513,419**
TOTAL SOURCES OF FUNDS	**989,528**
USES OF FUNDS	
Administrative:	281,539
Tenant and Social Services:	123,326
Utilities:	115,810
Ordinary Maintenance and Operation:	335,085
Protective Services:	62,633
General Expenditures:	99,609
Capitalized Items	25,000
Total Expenditures Before Other Items	**1,043,002**
TOTAL USES OF FUNDS	**1,043,002**

EXHIBIT Q

ASSET MANAGEMENT PROJECTS

CEDAR KNOLL, LEAFCREST, MALLARD RIDGE

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	233,688
Other Resident Income i.e. Late Fees, Excess Utilities	40,932
Other Revenue - Cable, Antenna, Vending	61,097
Total Operating Revenues	**335,717**
Other Sources:	
Inter-AMP Excess Cash Transfer In	142,325
Operating Transfer In - MTW	823,687
Total Other Sources:	**966,012**
TOTAL SOURCES OF FUNDS	**1,301,729**
USES OF FUNDS	
Administrative:	299,019
Tenant and Social Services:	143,489
Utilities:	223,113
Ordinary Maintenance and Operation:	449,007
Protective Services	75,740
General Expenditures:	45,362
Capitalized Items:	66,000
Total Expenditures Before Other Items	**1,301,729**
TOTAL USES OF FUNDS	**1,301,729**

EXHIBIT R

ASSET MANAGEMENT PROJECTS

HALL HOUSE, AUTUMN PLACE

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	160,752
Other Resident Income i.e. Late Fees, Excess Utilities	2,133
Other Revenue - Cable, Antenna, Vending	56,589
Total Operating Revenues	**219,474**
Other Sources:	
Inter-AMP Excess Cash Transfer In	39,508
Operating Transfer In - MTW	740,986
Total Other Sources:	**780,494**
TOTAL SOURCES OF FUNDS	**999,968**
USES OF FUNDS	
Administrative:	148,791
Tenant and Social Services:	71,348
Utilities:	203,639
Ordinary Maintenance and Operation:	266,636
Protective Services:	88,957
General Expenditures:	116,124
Total Expenditures Before Other Items	**895,496**
Other Items:	
Inter-AMP Excess Cash Transfer Out	104,472
Total Other Items	**104,472**
TOTAL USES OF FUNDS	**999,968**

EXHIBIT S

ASSET MANAGEMENT PROJECTS

GLADEDALE, WALLACE WOODS, MEADOW OAKS

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	206,832
Other Resident Income i.e. Late Fees, Excess Utilities	39,408
Other Revenue - Cable, Antenna, Vending	51,870
Total Operating Revenues	**298,110**
Other Sources:	
Inter-AMP Excess Cash Transfer In	93,979
Operating Transfer In - MTW	1,003,696
Total Other Sources:	**1,097,675**
TOTAL SOURCES OF FUNDS	**1,395,786**
USES OF FUNDS	
Administrative:	299,445
Tenant and Social Services:	141,068
Utilities:	254,797
Ordinary Maintenance and Operation:	483,367
Protective Services:	61,493
General Expenditures:	38,465
Capitalized Items:	117,150
Total Expenditures Before Other Items	**1,395,786**
TOTAL USES OF FUNDS	**1,395,786**

EXHIBIT T

ASSET MANAGEMENT PROJECTS

ROBINSDALE, SUNRIDGE, CLAREMONT, VICTORIA SQU.

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	320,052
Other Resident Income i.e. Late Fees, Excess Utilities	(18,145)
Other Revenue - Cable, Antenna, Vending	59,792
Total Operating Revenues	**361,699**
Other Sources:	
Inter-AMP Excess Cash Transfer In	410,992
Operating Transfer In - MTW	1,021,282
Total Other Sources:	**1,432,274**
TOTAL SOURCES OF FUNDS	**1,793,973**
USES OF FUNDS	
Administrative:	339,606
Tenant and Social Services:	354,513
Utilities:	350,594
Ordinary Maintenance and Operation:	536,589
Protective Services:	84,102
General Expenditures:	26,569
Capitalized Items	102,000
Total Expenditures Before Other Items	**1,793,973**
TOTAL USES OF FUNDS	**1,793,973**

EXHIBIT U

ASSET MANAGEMENT PROJECTS

TALL OAKS, TARLTON HILLS, SAVANNA WOODS

SOURCES OF FUNDS	April 2009-March 2010
Tenant Rental Revenue	315,924
Other Resident Income i.e. Late Fees, Excess Utilities	43,797
Other Revenue - Cable, Antenna, Vending	63,701
Total Operating Revenues	**423,422**
Other Sources:	
Inter-AMP Excess Cash Transfer In	56,723
Operating Transfer In - MTW	997,535
Total Other Sources:	**1,054,258**
TOTAL SOURCES OF FUNDS	**1,477,680**
USES OF FUNDS	
Administrative:	305,793
Tenant and Social Services:	162,411
Utilities:	347,655
Ordinary Maintenance and Operation:	422,229
Protective Services:	68,438
General Expenditures:	65,454
Capitalized Items:	105,700
Total Expenditures Before Other Items	**1,477,680**
TOTAL USES OF FUNDS	**1,477,680**

EXHIBIT V

ASSET MANAGEMENT PROJECTS

FIRST WARD

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	57,203
Total Operating Revenues	**57,203**
Other Sources:	
Operating Transfer In - First Ward Interest	305,301
Operating Transfer In - MTW	300,627
Total Other Sources:	**605,928**
TOTAL SOURCES OF FUNDS	**663,131**
USES OF FUNDS	
Tenant and Social Services:	304,501
Ordinary Maintenance and Operation:	6,000
General Expenditures:	52,003
Total Expenditures Before Other Items	**362,504**
Other Items:	
Transfer Out - Mixed Finance Properties	300,627
Total Other Items	**300,627**
TOTAL USES OF FUNDS	**663,131**

EXHIBIT W

ASSET MANAGEMENT PROJECTS

ARBOR GLEN 50

SOURCES OF FUNDS	April 2009- March 2010
Other Sources:	
Operating Transfer In -Other	5,750
Operating Transfer In - MTW	110,937
Total Other Sources:	**116,687**
TOTAL SOURCES OF FUNDS	**116,687**
USES OF FUNDS	
Tenant and Social Services:	29,025
Ordinary Maintenance and Operation:	334
General Expenditures:	67
Total Expenditures Before Other Items	**29,426**
Other Items:	
Transfer Out - Mixed Finance Communities	87,261
Total Other Items	**87,261**
TOTAL USES OF FUNDS	**116,687**

EXHIBIT X

ASSET MANAGEMENT PROJECTS

ARBOR GLEN I

SOURCES OF FUNDS	April 2009- March 2010
Other Revenue	42,356
Total Other Revenues:	**42,356**
Other Sources:	
Operating Transfer In - Other	50,000
Operating Transfer In - MTW	189,843
Total Other Sources:	**239,843**
TOTAL SOURCES OF FUNDS	**282,199**
USES OF FUNDS	
Tenant and Social Services	69,588
Ordinary Maintenance and Operation:	734
General Expenditures	42,504
Total Expenditures Before Other Items	**112,826**
Other Items:	
Transfer Out - Mixed Finance Communities	169,373
Total Other Items	**169,373**
TOTAL USES OF FUNDS	**282,199**

EXHIBIT Y

ASSET MANAGEMENT PROJECTS

PARK AT OAKLAWN

SOURCES OF FUNDS	April 2009- March 2010
Other Revenue	57,143
Total Other Revenues:	**57,143**
Other Sources:	
Operating Transfer In - Other	22,500
Operating Transfer In - MTW	423,268
Total Other Sources:	**445,768**
TOTAL SOURCES OF FUNDS	**502,911**
USES OF FUNDS	
Tenant and Social Services:	103,199
Ordinary Maintenance and Operation:	1,068
General Expenditures:	57,358
Total Expenditures Before Other Items	**161,625**
Other Items:	
Transfer Out - Mixed Finance Communities	341,286
Total Other Items	**341,286**
TOTAL USES OF FUNDS	**502,911**

EXHIBIT Z

ASSET MANAGEMENT PROJECTS

ROCKY BRANCH II

SOURCES OF FUNDS	April 2009- March 2010
Other Sources:	
Operating Transfer In - MTW	96,942
Total Other Sources:	**96,942**
TOTAL SOURCES OF FUNDS	**96,942**
USES OF FUNDS	
Tenant and Social Services	23,220
Ordinary Maintenance and Operation:	267
General Expenditures	54
Total Expenditures Before Other Items	**23,541**
Other Items:	
Transfer Out - Mixed Finance Communities	73,401
Total Other Items	**73,401**
TOTAL USES OF FUNDS	**96,942**

EXHIBIT AA

ASSET MANAGEMENT PROJECTS

ARBOR GLEN II

SOURCES OF FUNDS	April 2009- March 2010
Other Revenue	24,731
Total Other Revenues:	**24,731**
Other Sources:	36,000
Operating Transfer In - Other	128,438
Operating Transfer In - MTW	**164,438**
Total Other Sources:	
TOTAL SOURCES OF FUNDS	**189,169**
USES OF FUNDS	
Tenant and Social Services:	46,368
Ordinary Maintenance and Operation:	467
General Expenditures:	24,825
Total Expenditures Before Other Items	**71,660**
Other Items:	
Transfer Out - Mixed Finance Communities	117,509
Total Other Items	**117,509**
TOTAL USES OF FUNDS	**189,169**

EXHIBIT AB

ASSET MANAGEMENT PROJECTS

NIA POINT

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	37,857
Total Other Revenues:	**37,857**
Other Sources:	
Operating Transfer In - Other	20,250
Operating Transfer In - MTW	106,194
Total Other Sources:	**126,444**
TOTAL SOURCES OF FUNDS	**164,301**
USES OF FUNDS	
Tenant and Social Services	33,611
Ordinary Maintenance and Operation:	334
General Expenditures	37,924
Total Expenditures Before Other Items	**71,869**
Other Items:	
Transfer Out - Mixed Finance Communities	92,432
Total Other Items	**92,432**
TOTAL USES OF FUNDS	**164,301**

EXHIBIT AC

ASSET MANAGEMENT PROJECTS

ARBOR GLEN III

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	9,696
Total Other Revenues:	**9,696**
Other Sources:	
Operating Transfer In - Other	5,750
Operating Transfer In - MTW	46,735
Total Other Sources:	**52,485**
TOTAL SOURCES OF FUNDS	**62,181**
USES OF FUNDS	
Tenant and Social Services:	13,903
Ordinary Maintenance and Operation:	134
General Expenditures:	9,722
Total Expenditures Before Other Items	**23,759**
Other Items:	
Transfer Out - Mixed Finance Communities	38,422
Total Other Items	**38,422**
TOTAL USES OF FUNDS	**62,181**

EXHIBIT AD

ASSET MANAGEMENT PROJECTS

MCADEN PARK

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	17,651
Total Other Revenues:	**17,651**
Other Sources:	
Operating Transfer In - Other	30,000
Operating Transfer In - MTW	113,726
Total Other Sources:	**143,726**
TOTAL SOURCES OF FUNDS	**161,377**
USES OF FUNDS	
Tenant and Social Services:	64,830
Ordinary Maintenance and Operation:	401
General Expenditures:	17,731
Total Expenditures Before Other Items	**82,962**
Other Items:	
Transfer Out - Mixed Finance Communities	78,415
Total Other Items	**78,415**
TOTAL USES OF FUNDS	**161,377**

EXHIBIT AE

ASSET MANAGEMENT PROJECTS

STONEHAVEN

SOURCES OF FUNDS	April 2009-March 2010
Other Sources:	
Operating Transfer In - MTW	80,575
Total Other Sources:	**80,575**
TOTAL SOURCES OF FUNDS	**80,575**
USES OF FUNDS	
Tenant and Social Services:	27,806
Ordinary Maintenance and Operation:	267
General Expenditures:	54
Total Expenditures Before Other Items	**28,127**
Other Items:	
Transfer Out - Mixed Finance Communities	52,448
Total Other Items	**52,448**
TOTAL USES OF FUNDS	**80,575**

EXHIBIT AF

ASSET MANAGEMENT PROJECTS

MONTGOMERY

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	19,738
Total Other Revenues:	**19,738**
Other Sources:	
Operating Transfer In - Other	20,000
Operating Transfer In - MTW	64,997
Total Other Sources:	**84,997**
TOTAL SOURCES OF FUNDS	**104,735**
USES OF FUNDS	
Tenant and Social Services:	23,220
Ordinary Maintenance and Operation:	267
General Expenditures:	19,792
Total Expenditures Before Other Items	**43,279**
Other Items:	
Transfer Out - Mixed Finance Communities	61,456
Total Other Items	**61,456**
TOTAL USES OF FUNDS	**104,735**

EXHIBIT AG

ASSET MANAGEMENT PROJECTS

PROSPERITY CREEK

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	135,010
Total Other Revenues:	**135,010**
Other Sources:	
Operating Transfer In - Other	22,000
Operating Transfer In - MTW	217,706
Total Other Sources:	**239,706**
TOTAL SOURCES OF FUNDS	**374,716**
USES OF FUNDS	
Tenant and Social Services:	92,671
General Expenditures:	135,010
Total Expenditures Before Other Items	**227,681**
Other Items:	
Transfer Out - Mixed Finance Communities	147,035
Total Other Items	**147,035**
TOTAL USES OF FUNDS	**374,716**

EXHIBIT AH

ASSET MANAGEMENT PROJECTS

SOUTHOAK CROSSING

SOURCES OF FUNDS	April 2009-March 2010
Other Sources:	
Operating Transfer In - Other	20,000
Operating Transfer In - MTW	60,254
Total Other Sources:	**80,254**
TOTAL SOURCES OF FUNDS	**80,254**
USES OF FUNDS	
Tenant and Social Services:	23,220
Ordinary Maintenance and Operation:	267
General Expenditures:	54
Total Expenditures Before Other Items	**23,541**
Other Items:	
Transfer Out - Mixed Finance Communities	56,713
Total Other Items	**56,713**
TOTAL USES OF FUNDS	**80,254**

EXHIBIT AI

ASSET MANAGEMENT PROJECTS

SPRINGFIELD

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	43,297
Total Other Revenues:	**43,297**
Other Sources:	
Operating Transfer In - Other	22,000
Operating Transfer In - MTW	66,669
Total Other Sources:	**88,669**
TOTAL SOURCES OF FUNDS	**131,966**
USES OF FUNDS	
Tenant and Social Services:	25,513
Ordinary Maintenance and Operation:	267
General Expenditures:	43,351
Total Expenditures Before Other Items	**69,131**
Other Items:	
Transfer Out - Mixed Finance Communities	62,835
Total Other Items	**62,835**
TOTAL USES OF FUNDS	**131,966**

EXHIBIT AJ

ASSET MANAGEMENT PROJECTS

940 BREVARD

SOURCES OF FUNDS	April 2009- March 2010
Other Revenue	16,951
Total Other Revenues:	**16,951**
Other Sources:	
Operating Transfer In - Other	20,000
Operating Transfer In - MTW	19,075
Total Other Sources:	**39,075**
TOTAL SOURCES OF FUNDS	**56,026**
USES OF FUNDS	
Tenant and Social Services:	39,075
General Expenditures:	16,951
Total Expenditures Before Other Items	**56,026**
TOTAL USES OF FUNDS	**56,026**

EXHIBIT AK

ASSET MANAGEMENT PROJECTS

SEIGLE POINT

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	35,765
Total Other Revenues:	**35,765**
Other Sources:	
Operating Transfer In - Other	102,000
Operating Transfer In - MTW	8,961
Total Other Sources:	**110,961**
TOTAL SOURCES OF FUNDS	**146,726**
USES OF FUNDS	
Tenant and Social Services	109,437
Ordinary Maintenance and Operation:	1,268
General Expenditures	36,021
Total Expenditures Before Other Items	**146,726**
TOTAL USES OF FUNDS	**146,726**

EXHIBIT AL

ASSET MANAGEMENT PROJECTS

MCALPINE TERRACE

SOURCES OF FUNDS	April 2009-March 2010
Other Sources:	
Operating Transfer In - Other	26,000
Total Other Sources:	**26,000**
TOTAL SOURCES OF FUNDS	**26,000**
USES OF FUNDS	
Tenant and Social Services	26,000
Total Expenditures Before Other Items	**26,000**
TOTAL USES OF FUNDS	**26,000**

EXHIBIT AM

ASSET MANAGEMENT PROJECTS

GLEN COVE

SOURCES OF FUNDS	April 2009-March 2010
Other Sources:	
Operating Transfer In - Other	10,000
Operating Transfer In - MTW	443
Total Other Sources:	**10,443**
TOTAL SOURCES OF FUNDS	**10,443**
USES OF FUNDS	
Tenant and Social Services	10,282
Ordinary Maintenance and Operation:	134
General Expenditures	27
Total Expenditures Before Other Items	**10,443**
TOTAL USES OF FUNDS	**10,443**

EXHIBIT AN

ASSET MANAGEMENT PROJECTS

LIVE OAK SENIORS

SOURCES OF FUNDS	April 2009-March 2010
Other Sources:	
Operating Transfer In - Other	9,000
Operating Transfer In - MTW	2,991
Total Other Sources:	**11,991**
TOTAL SOURCES OF FUNDS	**11,991**
USES OF FUNDS	
Tenant and Social Services	11,991
Total Expenditures Before Other Items	**11,991**
TOTAL USES OF FUNDS	**11,991**

EXHIBIT AO

ASSET MANAGEMENT PROJECTS

ASHLEY PARK

SOURCES OF FUNDS	April 2009-March 2010
Other Sources:	
Operating Transfer In - Other	24,000
Operating Transfer In - MTW	4,032
Total Other Sources:	**28,032**
TOTAL SOURCES OF FUNDS	**28,032**
USES OF FUNDS	
Tenant and Social Services	27,711
Ordinary Maintenance and Operation:	267
General Expenditures	54
Total Expenditures Before Other Items	**28,032**
TOTAL USES OF FUNDS	**28,032**

EXHIBIT AP

ASSET MANAGEMENT PROJECTS

LIVE OAK

SOURCES OF FUNDS	April 2009-March 2010
Other Revenue	3,804
Total Other Revenues:	**3,804**
Other Sources:	
Operating Transfer In - MTW	36,819
Total Other Sources:	**36,819**
TOTAL SOURCES OF FUNDS	**40,623**
USES OF FUNDS	
Administrative	4,689
Tenant and Social Services	14,900
General Expenditures	21,034
Total Expenditures Before Other Items	**40,623**
TOTAL USES OF FUNDS	**40,623**

7. Annual Statement/Performance and Evaluation Report

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

PHA Name:	Grant Type and Number	FFY of Grant:
Housing Authority of the City of Charlotte	Capital Fund Program Grant No: NC19P00350109 Replacement Housing Factor Grant No:	2009

Original Annual Statement — Revised Annual Statement (revision no:)
Performance and Evaluation Report for Period Ending: — Final Perforance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	TOTAL NON-CGP FUNDS				
2	1406 OPERATIONS	$0			
3	1408 MANAGEMENT IMPROVEMENTS	$0			
4	1410 ADMINISTRATION	$541,397			
5	1411 AUDIT	$0			
6	1415 LIQUIDATED DAMAGES	$0			
7	1430 FEES AND COSTS	$0			
8	1440 SITE ACQUISITION	$0			
9	1450 SITE IMPROVEMENTS	$0			
10	1460 DWELLING STRUCTURES	$0			
11	1465.1 DWELLING EQUIPMENT-NONEXPENDABLE	$0			
12	1470 NONDWELLING STRUCTURES	$0			
13	1475 NONDWELLING EQUIPMENT	$0			
14	1485 DEMOLITION	$0			
15	1490 REPLACEMENT FOR RESERVE	$0			
16	1492 MOVING TO WORK DEMOSTRATION	$4,797,575			
17	1495.1 RELOCATION COSTS	$0			
18	1499 DEVELOPMENT ACTIVITIES	$0			
19	1501 COLLATERIZATION OF DEBT SERVICE	$0			
20	1502 CONTINGENCY	$0			
21	AMOUNT OF ANNUAL GRANT (SUM OF LINES 2-19)	$5,338,972	$0	$0	$0
22	Amount of line 21 Related to LBP Activities	0	0	0	0
23	Amount of line 21 Related to Section 504 Compliance	0	0	0	0
24	Amount of line 21 Related to Security - Soft Costs	0	0	0	0
25	Amount of line 21 Related to Security - Hard Costs	0	0	0	0
26	Amount of line 21 Related to Energy Conservation Measures	0	0	0	0

Signature of President/CEO and Date

Annual Statement/Performance and Evaluation Report

nc003b01

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Table

Capital Fund Grant Number: NC19P00350109 **FFY of Grant Approval:** 10/2009

2009

Revision #

NC19P00350109

HA Name: HOUSING AUTHORITY OF THE CITY OF CHARLOTTE

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost	Total Actual Cost Funds Obligated	Funds Expended	Status of Work
ADMINISTRATION	10% Contribution to Central Office Cost Center	1410	LS	$541,397			
	CF LEGAL, TRAVEL, PRINTING, PHONE	1410	LS				
	TOTAL			**$541,397**			
MOVING TO Work	Moving to Work Demonstration	1492	LS	**$4,797,575**			
	TOTAL			**$4,797,575**			
	GRANT TOTAL			**$5,338,972**			

Signature of President/CEO and Date

APPENDIX G

Annual Statement/Performance and Evaluation Report

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

PHA Name:	**Housing Authority of the City of Charlotte**	**Grant Type and Number** Capital Fund Program Grant No: Replacement Housing Factor Grant No: **NC19R00350209**	FFY of Grant: **2009**
X	**Original Annual Statement** **Performance and Evaluation Report for Period Ending:**	**Revised Annual Statement (revision no:)** **Final Perforance and Evaluation Report**	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	TOTAL NON-CGP FUNDS				
2	1406 OPERATIONS				
3	1408 MANAGEMENT IMPROVEMENTS				
4	1410 ADMINISTRATION				
5	1411 AUDIT				
6	1415 LIQUIDATED DAMAGES				
7	1430 FEES AND COSTS				
8	1440 SITE ACQUISITION				
9	1450 SITE IMPROVEMENTS				
10	1460 DWELLING STRUCTURES	$290,100			
11	1465.1 DWELLING EQUIPMENT-NONEXPENDABLE				
12	1470 NONDWELLING STRUCTURES				
13	1475 NONDWELLING EQUIPMENT				
14	1485 DEMOLITION				
15	1490 REPLACEMENT FOR RESERVE				
16	1492 MOVING TO WORK DEMOSTRATION				
17	1495.1 RELOCATION COSTS				
18	1499 DEVELOPMENT ACTIVITIES				
19	1501 COLLATERIZATION OF DEBT SERVICE				
20	1502 CONTINGENCY				
21	AMOUNT OF ANNUAL GRANT (SUM OF LINES 2-19)	**$290,100**			
22	Amount of line 21 Related to LBP Activities	0	0		
23	Amount of line 21 Related to Section 504 Compliance	0	0		
24	Amount of line 21 Related to Security - Soft Costs	0	0		
25	Amount of line 21 Related to Security - Hard Costs	0	0		
26	Amount of line 21 Related to Energy Conservation Measures	0	0		

Signature of President/CEO and Date

ANNUAL STATEMENT
CAPITAL FUND PROGRAM REPLACEMENT HOUSING FACTOR (CFPRHF)
Part II: Supporting Table

Replacement Housing Factor Grant Number: NC19R00350209 **FFY of Grant Approval:** 10/2009

X Original Annual Statement

HA Name: HOUSING AUTHORITY OF THE CITY OF CHARLOTTE

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost	Total Actual Cost Funds Obligated	Funds Expended	Status of Work
RHF (Replacement Housing Factor)	2009 Replacement Housing Factor Funds - Dwelling Structures	1460		$290,100.00			

Signature of President/CEO and Date

Annual Statement/Performance and Evaluation Report

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

PHA Name:	**Housing Authority of the City of Charlotte**	**Grant Type and Number** Capital Fund Program Grant No: Replacement Housing Factor Grant No: **NC19R00350109**	FFY of Grant: **2009**
X	**Original Annual Statement** **Performance and Evaluation Report for Period Ending:**	**Revised Annual Statement (revision no:)** **Final Perforance and Evaluation Report**	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	TOTAL NON-CGP FUNDS				
2	1406 OPERATIONS				
3	1408 MANAGEMENT IMPROVEMENTS				
4	1410 ADMINISTRATION				
5	1411 AUDIT				
6	1415 LIQUIDATED DAMAGES				
7	1430 FEES AND COSTS				
8	1440 SITE ACQUISITION				
9	1450 SITE IMPROVEMENTS				
10	1460 DWELLING STRUCTURES	$302,576			
11	1465.1 DWELLING EQUIPMENT-NONEXPENDABLE				
12	1470 NONDWELLING STRUCTURES				
13	1475 NONDWELLING EQUIPMENT				
14	1485 DEMOLITION				
15	1490 REPLACEMENT FOR RESERVE				
16	1492 MOVING TO WORK DEMOSTRATION				
17	1495.1 RELOCATION COSTS				
18	1499 DEVELOPMENT ACTIVITIES				
19	1501 COLLATERIZATION OF DEBT SERVICE				
20	1502 CONTINGENCY				
21	AMOUNT OF ANNUAL GRANT (SUM OF LINES 2-19)	$302,576			
22	Amount of line 21 Related to LBP Activities	0	0		
23	Amount of line 21 Related to Section 504 Compliance	0	0		
24	Amount of line 21 Related to Security - Soft Costs	0	0		
25	Amount of line 21 Related to Security - Hard Costs	0	0		
26	Amount of line 21 Related to Energy Conservation Measures	0	0		

Signature of President/CEO and Date

ANNUAL STATEMENT
CAPITAL FUND PROGRAM REPLACEMENT HOUSING FACTOR (CFPRHF)

Part II: Supporting Table

Replacement Housing Factor Grant Number: **NC19R00350109** **FFY of Grant Approval:** **10/2009**

X **Original Annual Statement**

HA Name: HOUSING AUTHORITY OF THE CITY OF CHARLOTTE

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost	Total Actual Cost Funds Obligated	Funds Expended	Status of Work
RHF (Replacement Housing Factor)	2009 Replacement Housing Factor Funds -Dwelling Structures	1460		$302,576.00			

Signature of President/CEO and Date

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #3 Southside			AMP #5 First Ward			AMP #6 Edwin Towers		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption		1,957,681	164,754	10,978	40,810	56		2,473,848	
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1		1,684,202	147,431	10,734	40,001	41		2,561,848	
03	Rolling Base Year 2		1,614,710	190,185	9,940	38,733	48		2,609,848	
04	Rolling Base Year 3		1,540,013	158,386	9,769	43,321	43		2,975,848	
05	Total Consumption-Rolling Base	-	4,838,925	496,002	30,443	122,055	132	-	8,147,544	-
06	Average Rolling Base Consumption	-	1,612,975	165,334	10,148	40,685	44	-	2,715,848	-
07	Actual Consumption - New Units									
08	Rolling Base Consumption	-	1,612,975	165,334	10,148	40,685	44	-	2,715,848	-
Section 4										
09	Base Consumption	-	1,612,975	164,754	10,148	40,685	44	-	2,473,848	-
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	344,706	-	830	125	12	-	-	-
11	Actual < Rolling Base	-	-	580	-	-	-	-	242,000	-
12	75%/25% split	-	86,177	-	208	31	3	-	-	-
13	75%/25% split	-	-	435	-	-	-	-	181,500	-
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units									
15	Payable Consumption	-	1,699,152	165,189	10,356	40,716	47	-	2,655,348	-
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs		231,288	242,913	$ 53,433	$ 7,918	$ 204		$ 154,982	
17	Actual Average Utility Rate		$ 0.1181	$ 1.4744	$ 4.8673	$ 0.1940	$ 3.6429		$ 0.0626	
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ -	$ 200,670	$ 243,555	$ 50,406	$ 7,899	$ 171	$ -	$ 166,225	$ -
19	Charge for Excess Utilities			$ 52,884			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 391,341			$ 58,476			$ 166,225
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 428,284			$ 63,996			$ 181,917
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 428,284			$ 63,996			$ 181,917
25	Eligible Unit Months			4,728			1,584			2,088
26	**Utilities Expense Level - PUM**			**$ 90.58**			**$ 40.40**			**$ 87.13**

25 Section B line 15 + 17 - 4

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #7 Strawn			AMP #9 Arbor Glen 50			AMP #10 Arbor Glen #1		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption		3,562,131		913	16,450	109	5,399	52,868	456
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1		3,628,420		366	14,527	97	5,070	49,979	345
03	Rolling Base Year 2		3,706,393		479	15,972	101	4,604	56,075	607
04	Rolling Base Year 3		3,611,850		552	16,441	97	5,003	45,900	903
05	Total Consumption-Rolling Base	-	10,946,663	-	1,397	46,940	295	14,677	151,954	1,855
06	Average Rolling Base Consumption	-	3,648,888	-	466	15,647	98	4,892	50,651	618
07	Actual Consumption - New Units									
08	Rolling Base Consumption	-	3,648,888	-	466	15,647	98	4,892	50,651	618
Section 4										
09	Base Consumption	-	3,562,131	-	466	15,647	98	4,892	50,651	456
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	447	803	11	507	2,217	-
11	Actual < Rolling Base	-	86,757	-	-	-	-	-	-	162
12	75%/25% split	-	-	-	112	201	3	127	554	-
13	75%/25% split	-	65,068	-	-	-	-	-	-	122
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units									
15	Payable Consumption	-	3,627,199	-	578	15,848	101	5,019	51,205	578
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs		$ 204,120		$ 7,762	$ 1,707	$ 280	$ 29,835	$ 14,882	$ 827
17	Actual Average Utility Rate		$ 0.0573		$ 8.5012	$ 0.1038	$ 2.5688	$ 5.5260	$ 0.2815	$ 1.8136
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ -	$ 207,839	$ -	$ 4,914	$ 1,645	$ 259	$ 27,735	$ 14,414	$ 1,048
19	Charge for Excess Utilities			$ -			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 207,839			$ 6,818			$ 43,197
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 227,459			$ 7,462			$ 47,275
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 227,459			$ 7,462			$ 47,275
25	Eligible Unit Months			3,804			348			720
26	**Utilities Expense Level - PUM**			**$ 59.79**			**$ 21.44**			**$ 65.66**

25 Section B line 15 + 17 - 4

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #11 Boulevard			AMP #12 Dillehay			AMP #16 Leafcrest / Cedar Knoll / Mallard Ridge		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption		2,207,334	183,582		1,074,347	89,001	-	1,342,217	18,929
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1		2,183,420	184,920		1,040,097	91,633	-	1,028,032	16,154
03	Rolling Base Year 2		2,268,107	208,007		1,024,337	96,609	-	1,634,037	23,119
04	Rolling Base Year 3		2,123,628	181,762		877,187	94,249	-	1,747,284	27,234
05	Total Consumption-Rolling Base	-	6,575,155	574,689	-	2,941,621	282,491	-	4,409,353	66,507
06	Average Rolling Base Consumption	-	2,191,718	191,563	-	980,540	94,164	-	1,469,784	22,169
07	Actual Consumption - New Units							-	-	-
08	Rolling Base Consumption	-	2,191,718	191,563	-	980,540	94,164	-	1,469,784	22,169
Section 4										
09	Base Consumption	-	2,191,718	183,582	-	980,540	89,001	-	1,342,217	18,929
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	15,616	-	-	93,807	-	-	-	-
11	Actual < Rolling Base	-	-	7,981	-	-	5,163	-	127,567	3,240
12	75%/25% split	-	3,904	-	-	23,452	-	-	-	-
13	75%/25% split	-	-	5,986	-	-	3,872	-	95,675	2,430
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units							-	-	-
15	Payable Consumption	-	2,195,622	189,568	-	1,003,992	92,873	-	1,437,892	21,359
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs		$ 216,429	$ 303,334		$ 107,314	$ 138,349	$ -	$ 132,396	$ 30,031
17	Actual Average Utility Rate		$ 0.0980	$ 1.6523		$ 0.0999	$ 1.5545		$ 0.0986	$ 1.5865
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ -	$ 215,171	$ 313,223	$ -	$ 100,299	$ 144,371	$ -	$ 141,776	$ 33,886
19	Charge for Excess Utilities			$ 52,647			$ 31,423			$ 12,285
20	Base Utilities Exp Level less Charges			$ 475,747			$ 213,247			$ 163,377
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 520,658			$ 233,378			$ 178,800
23	Energy Rate Incentive									$ -
24	Utilities Expense Level			$ 520,658			$ 233,378			$ 178,800
25	Eligible Unit Months			3,600			1,632			1,584
26	**Utilities Expense Level - PUM**			**$ 144.63**			**$ 143.00**			**$ 112.88**

25 Section B line 15 + 17 - 4

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #18 Charlottetowne			AMP #19 Parketowne / Live Oak			AMP #20 Tarlton Hills / Tall Oaks / Savanna Woods		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption		1,967,538		-	1,609,575	-	-	1,103,528	93,692
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1		2,063,336		-	1,648,800	-	-	1,068,228	94,948
03	Rolling Base Year 2		1,968,336		-	1,610,100	-	-	1,105,803	100,017
04	Rolling Base Year 3		1,935,336		-	1,527,353	-	-	1,014,663	99,584
05	Total Consumption-Rolling Base	-	5,967,008	-	-	4,786,253	-	-	3,188,694	294,549
06	Average Rolling Base Consumption	-	1,989,003	-	-	1,595,418	-	-	1,062,898	98,183
07	Actual Consumption - New Units				-	-	-	-	-	-
08	Rolling Base Consumption	-	1,989,003	-	-	1,595,418	-	-	1,062,898	98,183
Section 4										
09	Base Consumption	-	1,967,538	-	-	1,595,418	-	-	1,062,898	93,692
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	-	14,157	-	-	40,630	-
11	Actual < Rolling Base	-	21,465	-	-	-	-	-	-	4,491
12	75%/25% split	-	-	-	-	3,539	-	-	10,158	-
13	75%/25% split	-	16,099	-	-	-	-	-	-	3,368
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units				-	-	-	-	-	-
15	Payable Consumption	-	1,983,637	-	-	1,598,957	-	-	1,073,056	97,060
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs		$ 116,402		-	90,265	-	$ -	$ 109,099	$ 148,079
17	Actual Average Utility Rate		$ 0.0592			$ 0.0561			$ 0.0989	$ 1.5805
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ -	$ 117,431	$ -	$ -	$ 89,701	$ -	$ -	$ 106,125	$ 153,403
19	Charge for Excess Utilities			$ -			$ -			$ 36,691
20	Base Utilities Exp Level less Charges			$ 117,431			$ 89,701			$ 222,837
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 128,516			$ 98,169			$ 243,873
23	Energy Rate Incentive						$ -			$ -
24	Utilities Expense Level			$ 128,516			$ 98,169			$ 243,873
25	Eligible Unit Months			2,148			1,956			1,788
26	**Utilities Expense Level - PUM**			**$ 59.83**			**$ 50.19**			**$ 136.39**

25 Section B line 15 + 17 - 4

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #22 Autumn Place / Hall House			AMP #25 Meadow Oaks / Gladedale / Wallace			AMP #28 Sunridge/Robinsdale/Claremont/Vic Sq		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption	3,969	2,634,312	54,426	-	1,154,109	51,669	12,041	1,400,994	53,891
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1	2,617	2,815,026	14,824	-	1,134,900	52,824	12,165	1,373,971	56,582
03	Rolling Base Year 2	2,365	2,742,936	66,543	-	1,165,329	63,744	10,812	1,433,756	57,934
04	Rolling Base Year 3	2,905	2,852,736	64,063	-	1,333,386	54,606	9,330	1,375,840	56,881
05	Total Consumption-Rolling Base	7,887	8,410,698	145,430	-	3,633,615	171,174	32,307	4,183,567	171,397
06	Average Rolling Base Consumption	2,629	2,803,566	48,477	-	1,211,205	57,058	10,769	1,394,522	57,132
07	Actual Consumption - New Units	-	-	-	-	-	-	-	-	-
08	Rolling Base Consumption	2,629	2,803,566	48,477	-	1,211,205	57,058	10,769	1,394,522	57,132
Section 4										
09	Base Consumption	2,629	2,634,312	48,477	-	1,154,109	51,669	10,769	1,394,522	53,891
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	1,340	-	5,949	-	-	-	1,272	6,472	-
11	Actual < Rolling Base	-	169,254	-	-	57,096	5,389	-	-	3,241
12	75%/25% split	335	-	1,487	-	-	-	318	1,618	-
13	75%/25% split	-	126,941	-	-	42,822	4,042	-	-	2,431
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units	-	-	-	-	-	-	-	-	-
15	Payable Consumption	2,964	2,761,253	49,964	-	1,196,931	55,711	11,087	1,396,140	56,322
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs	$ 20,060	$ 161,296	$ 69,370	$ -	$ 112,915	$ 85,930	$ 63,374	$ 144,128	$ 88,828
17	Actual Average Utility Rate	$ 5.0542	$ 0.0612	$ 1.2746		$ 0.0978	$ 1.6631	$ 5.2632	$ 0.1029	$ 1.6483
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ 14,981	$ 168,989	$ 63,684	$ -	$ 117,060	$ 92,653	$ 58,353	$ 143,663	$ 92,836
19	Charge for Excess Utilities			$ -			$ 19,576			$ 28,000
20	Base Utilities Exp Level less Charges			$ 247,654			$ 190,137			$ 266,852
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 271,033			$ 208,086			$ 292,043
23	Energy Rate Incentive			$ -			$ -			$ -
24	Utilities Expense Level			$ 271,033			$ 208,086			$ 292,043
25	Eligible Unit Months			3,096			1,548			1,872
26	**Utilities Expense Level - PUM**			**$ 87.54**			**$ 134.42**			**$ 156.01**

25 Section B line 15 + 17 - 4

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #30 The Park at Oaklawn			AMP #31 Rocky Branch II (Rivermere)			AMP #32 Arbor Glen II		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption	11,191	121,994	306	1,112	17,361	176	2,796	29,922	533
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1	10,691	120,355	245	1,195	20,498	251	3,117	34,864	278
03	Rolling Base Year 2	12,858	121,306	301	1,195	20,498	251	4,726	28,558	620
04	Rolling Base Year 3	11,001	119,548	251	1,195	20,498	251	4,726	28,558	620
05	Total Consumption-Rolling Base	34,550	361,209	797	3,585	61,494	753	12,569	91,980	1,518
06	Average Rolling Base Consumption	11,517	120,403	266	1,195	20,498	251	4,190	30,660	506
07	Actual Consumption - New Units									
08	Rolling Base Consumption	11,517	120,403	266	1,195	20,498	251	4,190	30,660	506
Section 4										
09	Base Consumption	11,191	120,403	266	1,112	17,361	176	2,796	29,922	506
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	1,591	40	-	-	-	-	-	27
11	Actual < Rolling Base	326	-	-	83	3,137	75	1,394	738	-
12	75%/25% split	-	398	10	-	-	-	-	-	7
13	75%/25% split	245	-	-	62	2,353	56	1,046	554	-
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units									
15	Payable Consumption	11,436	120,801	276	1,174	19,714	232	3,842	30,476	513
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs	$ 51,799	$ 20,549	$ 640	$ 5,262	$ 2,516	$ 292	$ 12,494	$ 6,366	$ 273
17	Actual Average Utility Rate	$ 4.6286	$ 0.1684	$ 2.0915	$ 4.7320	$ 0.1449	$ 1.6591	$ 4.4685	$ 0.2128	$ 0.5122
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ 52,933	$ 20,343	$ 577	$ 5,555	$ 2,857	$ 385	$ 17,168	$ 6,485	$ 263
19	Charge for Excess Utilities			$ -			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 73,853			$ 8,797			$ 23,916
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 80,825			$ 9,627			$ 26,174
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 80,825			$ 9,627			$ 26,174
25	Eligible Unit Months			1,068			240			480
26	**Utilities Expense Level - PUM**			**$ 75.68**			**$ 40.11**			**$ 54.53**
25	Section B line 15 + 17 - 4				Rolling base year 1; year 2 of full utilities			Rolling base year 2; year 3 of full utilities		

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #33 Mayfield Terrace (Nia Point)			AMP #35 Arbor Glen III			AMP #37 Seigle 60 (McAden Park)		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption	3,078	15,260	71	671	12,071	26	2,298	7,155	
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1				630	10,633	22			
03	Rolling Base Year 2				630	10,633	22			
04	Rolling Base Year 3				630	10,633	22			
05	Total Consumption-Rolling Base	-	-	-	1,890	31,899	66	-	-	-
06	Average Rolling Base Consumption	-	-	-	630	10,633	22	-	-	-
07	Actual Consumption - New Units	3,078	15,260	71				2,296	7,155	
08	Rolling Base Consumption	3,078	15,260	71	630	10,633	22	2,296	7,155	-
Section 4										
09	Base Consumption	3,078	15,260	71	630	10,633	22	2,296	7,155	-
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	41	1,438	4	2	-	-
11	Actual < Rolling Base	-	-	-	-	-	-	-	-	-
12	75%/25% split	-	-	-	10	360	1	1	-	-
13	75%/25% split	-	-	-	-	-	-	-	-	-
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units									
15	Payable Consumption	3,078	15,260	71	640	10,993	23	2,297	7,155	-
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs	$ 15,312	$ 2,998	$ 186	$ 3,607	$ 2,894	$ 44	$ 9,973	$ 944	
17	Actual Average Utility Rate	$ 4.9747	$ 0.1965	$ 2.6197	$ 5.3756	$ 0.2397	$ 1.6923	$ 4.3399	$ 0.1319	
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ 15,312	$ 2,999	$ 186	$ 3,440	$ 2,635	$ 39	$ 9,969	$ 944	$ -
19	Charge for Excess Utilities			$ -			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 18,497			$ 6,114			$ 10,913
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 20,243			$ 6,691			$ 11,943
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 20,243			$ 6,691			$ 11,943
25	Eligible Unit Months			348			144			360
26	**Utilities Expense Level - PUM**			**$ 58.17**			**$ 46.47**			**$ 33.18**
25	Section B line 15 + 17 - 4	First full year of utilities			Rolling base year 1; year 2 of full utilities			First full year of utilities		

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #38 Stonehaven			AMP #39 Montgomery Gardens			AMP #40 Prosperity Creek		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption	1,123	8,643	90	1,480	28,370	35	671	191,211	
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1	1,946	19,084	245						
03	Rolling Base Year 2	1,946	19,084	245						
04	Rolling Base Year 3	1,946	19,084	245						
05	Total Consumption-Rolling Base	5,838	57,252	735	-	-	-	-	-	-
06	Average Rolling Base Consumption	1,946	19,084	245	-	-	-	-	-	-
07	Actual Consumption - New Units				1,480	28,370	35	671	191,211	
08	Rolling Base Consumption	1,946	19,084	245	1,480	28,370	35	671	191,211	-
Section 4										
09	Base Consumption	1,123	8,643	90	1,480	28,370	35	671	191,211	-
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	-	-	-	-	-	-
11	Actual < Rolling Base	823	10,441	155	-	-	-	-	-	-
12	75%/25% split	-	-	-	-	-	-	-	-	-
13	75%/25% split	617	7,831	116	-	-	-	-	-	-
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units									
15	Payable Consumption	1,740	16,474	206	1,480	28,370	35	671	191,211	-
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs	6,954	1,323	169	7,973	4,006	115	$ 3,607	$ 16,718	
17	Actual Average Utility Rate	$ 6.1923	$ 0.1531	$ 1.8778	$ 5.3872	$ 0.1412	$ 3.2857	$ 5.3756	$ 0.0874	
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ 10,775	$ 2,522	$ 387	$ 7,973	$ 4,006	$ 115	$ 3,607	$ 16,712	$ -
19	Charge for Excess Utilities			$ -			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 13,684			$ 12,094			$ 20,319
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 14,976			$ 13,236			$ 22,237
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 14,976			$ 13,236			$ 22,237
25	Eligible Unit Months			288			240			864
26	**Utilities Expense Level - PUM**			**$ 52.00**			**$ 55.15**			**$ 25.74**
25	Section B line 15 + 17 - 4	Rolling base year 1; year 2 of full utilities			First full year of utilities			First full year of utilities		

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #41 South Oak Crossing			AMP #42 Springfield Gardens			AMP #44 940 Brevard		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption	619	11,415	36	996	14,956	52			
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1									
03	Rolling Base Year 2									
04	Rolling Base Year 3									
05	Total Consumption-Rolling Base	-	-	-	-	-	-	-	-	-
06	Average Rolling Base Consumption	-	-	-	-	-	-	-	-	-
07	Actual Consumption - New Units	619	11,415	36	996	14,956	52			
08	Rolling Base Consumption	619	11,415	36	996	14,956	52	-	-	-
Section 4										
09	Base Consumption	619	11,415	36	996	14,956	52	-	-	-
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	-	-	-	-	-	-
11	Actual < Rolling Base	-	-	-	-	-	-	-	-	-
12	75%/25% split	-	-	-	-	-	-	-	-	-
13	75%/25% split	-	-	-	-	-	-	-	-	-
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units	798	11,628	68				373	106,228	
15	Payable Consumption	1,417	23,043	104	996	14,956	52	373	106,228	-
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs	$ 3,211	$ 1,242	$ 64	$ 5,297	$ 2,909	$ 137			
17	Actual Average Utility Rate	$ 5.1874	$ 0.1088	$ 1.7778	$ 5.3183	$ 0.1945	$ 2.6346	$ 5.3756	$ 0.0874	
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ 7,351	$ 2,507	$ 185	$ 5,297	$ 2,909	$ 137	$ 2,005	$ 9,284	$ -
19	Charge for Excess Utilities			$ -			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 10,043			$ 8,343			$ 11,289
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 10,991			$ 9,131			$ 12,355
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 10,991			$ 9,131			$ 12,355
25	Eligible Unit Months			240			264			480
26	**Utilities Expense Level - PUM**			**$ 45.80**			**$ 34.59**			**$ 25.74**
25	Section B line 15 + 17 - 4	partial year of utilities			First full year of utilities			new units		

Housing Authority of the City of Charlotte
CY 2009 AMP Utilities Expense Level

		AMP #45 Seigle Point			AMP #48 McAlpine Terrace			AMP #49 Glen Cove Apartments		
		Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas	Sewer / Water	Electricity	Gas
Section 2										
	Current Consumption Level									
01	Actual Consumption									
Section 3										
	Rolling Base Consumption Level									
02	Rolling Base Year 1									
03	Rolling Base Year 2									
04	Rolling Base Year 3									
05	Total Consumption-Rolling Base	-	-	-	-	-	-	-	-	-
06	Average Rolling Base Consumption	-	-	-	-	-	-	-	-	-
07	Actual Consumption - New Units									
08	Rolling Base Consumption	-	-	-	-	-	-	-	-	-
Section 4										
09	Base Consumption	-	-	-	-	-	-	-	-	-
Section 5										
	Utility Consumption Incentive									
10	Actual > Rolling Base	-	-	-	-	-	-	-	-	-
11	Actual < Rolling Base	-	-	-	-	-	-	-	-	-
12	75%/25% split	-	-	-	-	-	-	-	-	-
13	75%/25% split	-	-	-	-	-	-	-	-	-
Section 6										
	Payable Consumption									
14	Annualization of Consumption-New Units	10,356	40,716	47	242	69,048		785	3,085	
15	Payable Consumption	10,356	40,716	47	242	69,048	-	785	3,085	-
Section 7										
	Actual Utility Cost and Average Rate									
16	Actual Utility Costs									
17	Actual Average Utility Rate	$ 4.8673	$ 0.1940	$ 3.6429	$ 5.3756	$ 0.0874		$ 4.8673	$ 0.1940	
Section 8										
	Base Utilities									
18	Base Utilities Expense Level	$ 50,406	$ 7,899	$ 171	$ 1,301	$ 6,035	$ -	$ 3,821	$ 598	$ -
19	Charge for Excess Utilities			$ -			$ -			$ -
20	Base Utilities Exp Level less Charges			$ 58,476			$ 7,336			$ 4,419
21	Utilities inflation / deflation factor			1.0944			1.0944			1.0944
Section 9										
	Calculation of Utilities Expense Level									
22	UEL adjusted for inflation/deflation			$ 63,996			$ 8,029			$ 4,836
23	Energy Rate Incentive									
24	Utilities Expense Level			$ 63,996			$ 8,029			$ 4,836
25	Eligible Unit Months			1,224			312			120
26	**Utilities Expense Level - PUM**			**$ 52.28**			**$ 25.73**			**$ 40.30**
25	Section B line 15 + 17 - 4	new units			new units			new units		

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy

Appendix F

Section 2

		AMP #3 Southside			AMP #5 First Ward		
	ACC Units 7/1/2006			394			132
	Additions						
	Deletions						
	ACC Units 6/30/2007			**394**			**132**
	Occupied Unit Months						
01	Occupied Units	3,688	3,688	3,688	1,572	1,572	1,572
02	Occupied Units by police			-	-		-
03	New units in funding period		-	-	-	-	-
04	New units - Oct-Dec		-	-	-	-	-
	Vacant Unit Months						
05	Mod units	867	867		-	-	
06	Special Use Units	156	156		-	-	
07	Litigation		-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	17			12		
	Other ACC						
12	Eligible for Asset Repo Fee	-					
13	All Other						
	Calculations						
14	Limited Vacancies		17			12	
15	**Total Unit Months**	**4,728**	**4,728**	**3,688**	**1,584**	**1,584**	**1,572**
16	Resident Participation Units	-		307	-		131
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3

	Project Expense Level						
01	PEL		$	369.99		$	399.91
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL		$	382.20		$	413.11
04	**PEL**		**$**	**1,807,042**		**$**	**654,366**
	Utilities Expense Level						
05	PUM Utilities Expense		$	152.03		$	40.40
06	**UEL**		**$**	**718,798**		**$**	**63,994**
	Add-ons						
07	Self-Sufficiency		$	-		$	-
08	Energy Loan Amortization		$	-		$	-
09	PILOT		$	10,457		$	26,217
10	Cost of Audit		$	4,991			
11	Resident Participation		$	7,675		$	3,275
12	Asset Management Fee		$	18,912		$	6,336
13	Information Technology Fee		$	9,456		$	3,168
14	Asset Repositioning Fee						
15	Changes in law, etc.		$	-		$	-
16	**Total Add-ons**		**$**	**51,491**		**$**	**38,996**
17	**Total Formula Expenses**		**$**	**2,577,331**		**$**	**757,356**
	Formula Income						
01	PUM Formula Income		$	115.44		$	238.01
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income		$	115.44		$	238.01
04	**Total Formula Income**		**$**	**545,800**		**$**	**377,008**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provisions**		**$**	**-**		**$**	**-**
	Calculation of Formula Amount						
01	Formula Calculation		$	2,031,531		$	380,348
02	Cost of Audit		$	4,991		$	-
03	**Formula Amount**		**$**	**2,031,531**		**$**	**380,348**
	100%			169,294.25			31,695.67
	88.96%	1,807,250		150,604.16	338,358		28,196.47

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy

Appendix F

Section 2

		AMP #6 Edwin Towers			AMP #7 Strawn		
	ACC Units 7/1/2006			175			318
	Additions						
	Deletions						
	ACC Units 6/30/2007			**175**			**318**
	Occupied Unit Months						
01	Occupied Units	2,073	2,073	2,073	3,781	3,781	3,781
02	Occupied Units by police	12		12	12		12
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		-	-	
07	Litigation		-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	15			23		
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		15			23	
15	**Total Unit Months**	**2,100**	**2,088**	**2,085**	**3,816**	**3,804**	**3,793**
16	Resident Participation Units	-		174	-		316
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3

	Project Expense Level						
01	PEL			$ 277.93			$ 286.20
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 287.10			$ 295.64
04	**PEL**			**$ 599,465**			**$ 1,124,615**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 116.55			$ 83.90
06	**UEL**			**$ 243,356**			**$ 319,156**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ 18,023			$ 15,736
09	PILOT			$ 22,811			$ 45,884
10	Cost of Audit			$ 2,206			$ 4,071
11	Resident Participation			$ 4,350			$ 7,900
12	Asset Management Fee			$ 8,400			$ 15,264
13	Information Technology Fee			$ 4,200			$ 7,632
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 59,990**			**$ 96,487**
17	**Total Formula Expenses**			**$ 902,811**			**$ 1,540,258**
	Formula Income						
01	PUM Formula Income			$ 188.72			$ 174.97
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 188.72			$ 174.97
04	**Total Formula Income**			**$ 394,047**			**$ 665,586**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 508,764			$ 874,672
02	Cost of Audit			$ 2,206			$ 4,071
03	**Formula Amount**			**$ 508,764**			**$ 874,672**
	100%			42,397.00			72,889.33
	88.96%		452,596	37,716.37		778,108	64,842.35

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		AMP #9 Arbor Glen 50			AMP #10 Arbor Glen #1		
Section 2							
	ACC Units 7/1/2006			29			60
	Additions						
	Deletions						
	ACC Units 6/30/2007			**29**			**60**
	Occupied Unit Months						
01	Occupied Units	297	297	297	716	716	716
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	48	48		-	-	
07	Litigation	-	-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	3			4		
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		3			4	
15	**Total Unit Months**	**348**	**348**	**297**	**720**	**720**	**716**
16	Resident Participation Units	-		25	-		60
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3							
	Project Expense Level						
01	PEL			$ 400.62			$ 317.78
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 413.84			$ 328.27
04	**PEL**			**$ 144,016**			**$ 236,354**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 21.44			$ 65.66
06	**UEL**			**$ 7,461**			**$ 47,275**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ -			$ -
09	PILOT			$ -			$ 8,561
10	Cost of Audit			$ -			$ 3,910
11	Resident Participation			$ 625			$ 1,500
12	Asset Management Fee			$ 1,392			$ 2,880
13	Information Technology Fee			$ 696			$ 1,440
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 2,713**			**$ 18,291**
17	**Total Formula Expenses**			**$ 154,190**			**$ 301,920**
	Formula Income						
01	PUM Formula Income			$ 165.67			$ 160.56
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 165.67			$ 160.56
04	**Total Formula Income**			**$ 57,653**			**$ 115,603**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 96,537			$ 186,317
02	Cost of Audit			$ -			$ 3,910
03	**Formula Amount**			**$ 96,537**			**$ 186,317**
	100%			8,044.75			15,526.42
	88.96%		85,879	7,156.61		165,748	13,812.30

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		AMP #11 Boulevard			AMP #12 Dillehay		
Section 2							
ACC Units 7/1/2006				300			136
Additions							-
Deletions							-
ACC Units 6/30/2007				**300**			**136**
Occupied Unit Months							
01	Occupied Units	3,520	3,520	3,520	1,583	1,583	1,583
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
Vacant Unit Months							
05	Mod units	-	-		-	-	
06	Special Use Units	24	24		12	12	
07	Litigation	-	-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	56			37		
Other ACC							
12	Eligible for Asset Repo Fee						
13	All Other						
Calculations							
14	Limited Vacancies		56			37	
15	**Total Unit Months**	**3,600**	**3,600**	**3,520**	**1,632**	**1,632**	**1,583**
16	Resident Participation Units	-		293	-		132
Special Provision for Utilities							
17	Unit Months		-			-	

Section 3							
Project Expense Level							
01	PEL			$ 405.94			$ 437.76
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 419.34			$ 452.21
04	**PEL**			**$ 1,509,624**			**$ 738,007**
Utilities Expense Level							
05	PUM Utilities Expense			$ 236.59			$ 222.46
06	**UEL**			**$ 851,724**			**$ 363,055**
Add-ons							
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ 46,840			$ 7,725
09	PILOT			$ -			$ -
10	Cost of Audit			$ 3,794			$ 1,727
11	Resident Participation			$ 7,325			$ 3,300
12	Asset Management Fee			$ 14,400			$ 6,528
13	Information Technology Fee			$ 7,200			$ 3,264
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 79,559**			**$ 22,544**
17	**Total Formula Expenses**			**$ 2,440,907**			**$ 1,123,606**
Formula Income							
01	PUM Formula Income			$ 140.13			$ 158.55
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 140.13			$ 158.55
04	**Total Formula Income**			**$ 504,468**			**$ 258,754**
Other Formula Provisions							
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
Calculation of Formula Amount							
01	Formula Calculation			$ 1,936,439			$ 864,852
02	Cost of Audit			$ 3,794			$ 1,727
03	**Formula Amount**			**$ 1,936,439**			**$ 864,852**
	100%			161,369.92			72,071.00
	88.96%		1,722,656	143,554.68		769,372	64,114.36

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		AMP #16 Leafcrest / Cedar Knoll / Mallard Ridge			AMP #18 Charlottetowne		
Section 2							
	ACC Units 7/1/2006			132			180
	Additions			-			-
	Deletions			-			-
	ACC Units 6/30/2007			**132**			**180**
	Occupied Unit Months						
01	Occupied Units	1,375	1,375	1,375	2,115	2,115	2,115
02	Occupied Units by police	-		-	12		12
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	182	182		-	-	
06	Special Use Units	-	-		12	12	
07	Litigation		-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	27			21		
	Other ACC						
12	Eligible for Asset Repo Fee	-					
13	All Other						
	Calculations						
14	Limited Vacancies		27			21	
15	**Total Unit Months**	**1,584**	**1,584**	**1,375**	**2,160**	**2,148**	**2,127**
16	Resident Participation Units	-		115	-		177
	Special Provision for Utilities						
17	Unit Months		-			-	
Section 3							
	Project Expense Level						
01	PEL			$ 361.24			$ 273.09
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 373.16			$ 282.10
04	**PEL**			**$ 591,085**			**$ 605,951**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 190.62			$ 82.10
06	**UEL**			**$ 301,942**			**$ 176,351**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ 12,647			$ 17,623
09	PILOT			$ 274			$ 26,095
10	Cost of Audit			$ 1,690			$ 2,269
11	Resident Participation			$ 2,875			$ 4,425
12	Asset Management Fee			$ 6,336			$ 8,640
13	Information Technology Fee			$ 3,168			$ 4,320
14	Asset Repositioning Fee			$ -			
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 26,990**			**$ 63,372**
17	**Total Formula Expenses**			**$ 920,017**			**$ 845,674**
	Formula Income						
01	PUM Formula Income			$ 235.33			$ 178.23
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 235.33			$ 178.23
04	**Total Formula Income**			**$ 372,763**			**$ 382,838**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 547,254			$ 462,836
02	Cost of Audit			$ 1,690			$ 2,269
03	**Formula Amount**			**$ 547,254**			**$ 462,836**
	100%			45,604.50			38,569.67
	88.96%		486,837	40,569.76		411,739	34,311.58

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Section 2

		AMP #19 Parketowne / Live Oak			AMP #20 Tarlton Hills / Tall Oaks / Savanna Woods		
	ACC Units 7/1/2006			164			149
	Additions			-			-
	Deletions			-			-
	ACC Units 6/30/2007			**164**			**149**
	Occupied Unit Months						
01	Occupied Units	1,954	1,954	1,954	1,766	1,766	1,766
02	Occupied Units by police	12		12	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		12	12	
07	Litigation		-			-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	2			10		
	Other ACC						
12	Eligible for Asset Repo Fee	384			-		
13	All Other						
	Calculations						
14	Limited Vacancies		2			10	
15	**Total Unit Months**	**2,352**	**1,956**	**1,966**	**1,788**	**1,788**	**1,766**
16	Resident Participation Units			164	-		147
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3

	Project Expense Level						
01	PEL			$ 270.90			$ 358.62
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 279.84			$ 370.45
04	**PEL**			**$ 547,367**			**$ 662,365**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 73.98			$ 208.45
06	**UEL**			**$ 144,705**			**$ 372,709**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ 20,397			$ 8,708
09	PILOT			$ 25,032			$ 4,468
10	Cost of Audit			$ 2,067			$ 1,904
11	Resident Participation			$ 4,100			$ 3,675
12	Asset Management Fee			$ 9,408			$ 7,152
13	Information Technology Fee			$ 4,704			$ 3,576
14	Asset Repositioning Fee			$ 32,508			$ -
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 98,216**			**$ 29,483**
17	**Total Formula Expenses**			**$ 790,288**			**$ 1,064,557**
	Formula Income						
01	PUM Formula Income			$ 190.23			$ 148.82
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 190.23			$ 148.82
04	**Total Formula Income**			**$ 372,090**			**$ 266,090**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 418,198			$ 798,467
02	Cost of Audit			$ 2,067			$ 1,904
03	**Formula Amount**			**$ 418,198**			**$ 798,467**
		100%		34,849.83			66,538.92
		88.96%	372,029	31,002.41		710,316	59,193.02

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		AMP #22 Autumn Place / Hall House			AMP #25 Meadow Oaks / Gladedale / Wallace		
Section 2							
	ACC Units 7/1/2006			259			129
	Additions			-			-
	Deletions			-			-
	ACC Units 6/30/2007			**259**			**129**
	Occupied Unit Months						
01	Occupied Units	1,595	1,595	1,595	1,521	1,521	1,521
02	Occupied Units by police	12		12	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		12	12	
07	Litigation	1,500	1,500			-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	1			15		
	Other ACC						
12	Eligible for Asset Repo Fee	-			-		
13	All Other						
	Calculations						
14	Limited Vacancies		1			15	
15	**Total Unit Months**	**3,108**	**3,096**	**1,607**	**1,548**	**1,548**	**1,521**
16	Resident Participation Units	-		134	-		127
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3							
	Project Expense Level						
01	PEL			$ 267.76			$ 356.95
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 276.60			$ 368.73
04	**PEL**			**$ 856,354**			**$ 570,794**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 112.30			$ 205.45
06	**UEL**			**$ 347,681**			**$ 318,037**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ 24,757			$ 16,765
09	PILOT			$ 16,672			$ 1,499
10	Cost of Audit			$ 3,290			$ 1,651
11	Resident Participation			$ 3,350			$ 3,175
12	Asset Management Fee			$ 12,432			$ 6,192
13	Information Technology Fee			$ 6,216			$ 3,096
14	Asset Repositioning Fee						$ -
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 66,717**			**$ 32,378**
17	**Total Formula Expenses**			**$ 1,270,752**			**$ 921,209**
	Formula Income						
01	PUM Formula Income			$ 186.46			$ 111.29
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 186.46			$ 111.29
04	**Total Formula Income**			**$ 577,280**			**$ 172,277**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 693,472			$ 748,932
02	Cost of Audit			$ 3,290			$ 1,651
03	**Formula Amount**			**$ 693,472**			**$ 748,932**
	100%			57,789.33			62,411.00
	88.96%		616,913	51,409.39		666,250	55,520.83

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		AMP #28 Sunridge/Robinsdale/Claremont/Vic Sq			AMP #30 The Park at Oaklawn		
Section 2							
	ACC Units 7/1/2006			156			89
	Additions			-			
	Deletions			-			
	ACC Units 6/30/2007			**156**			**89**
	Occupied Unit Months						
01	Occupied Units	1,810	1,810	1,810	1,051	1,051	1,051
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	36	36		-	-	
07	Litigation		-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	26			17		
	Other ACC						
12	Eligible for Asset Repo Fee	-					
13	All Other						
	Calculations						
14	Limited Vacancies		26			17	
15	**Total Unit Months**	**1,872**	**1,872**	**1,810**	**1,068**	**1,068**	**1,051**
16	Resident Participation Units	-		151	-		88
	Special Provision for Utilities						
17	Unit Months		-			-	
Section 3							
	Project Expense Level						
01	PEL			$ 340.33			$ 369.67
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 351.56			$ 381.87
04	**PEL**			**$ 658,120**			**$ 407,837**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 178.19			$ 75.68
06	**UEL**			**$ 333,572**			**$ 80,826**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ 1,306			$ -
09	PILOT			$ 262			$ 13,551
10	Cost of Audit			$ 1,978			$ 4,813
11	Resident Participation			$ 3,775			$ 2,200
12	Asset Management Fee			$ 7,488			$ 4,272
13	Information Technology Fee			$ 3,744			$ 2,136
14	Asset Repositioning Fee			$ -			
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 18,553**			**$ 26,972**
17	**Total Formula Expenses**			**$ 1,010,245**			**$ 515,635**
	Formula Income						
01	PUM Formula Income			$ 126.30			$ 139.85
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 126.30			$ 139.85
04	**Total Formula Income**			**$ 236,434**			**$ 149,360**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 773,811			$ 366,275
02	Cost of Audit			$ 1,978			$ 4,813
03	**Formula Amount**			**$ 773,811**			**$ 366,275**
	100%			64,484.25			30,522.92
	88.96%		688,382	57,365.19		325,838	27,153.19

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Section 2

		AMP #31 Rocky Branch II			AMP #32 Arbor Glen II		
	ACC Units 7/1/2006			20			40
	Additions						
	Deletions						
	ACC Units 6/30/2007			**20**			**40**
	Occupied Unit Months						
01	Occupied Units	240	240	240	478	478	478
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		-	-	
07	Litigation	-	-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	-			2		
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		-			2	
15	**Total Unit Months**	**240**	**240**	**240**	**480**	**480**	**478**
16	Resident Participation Units	-		20	-		40
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3

	Project Expense Level						
01	PEL		$	338.54		$	356.32
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL		$	349.71		$	368.08
04	**PEL**		**$**	**83,930**		**$**	**176,678**
	Utilities Expense Level						
05	PUM Utilities Expense		$	40.11		$	54.53
06	**UEL**		**$**	**9,626**		**$**	**26,174**
	Add-ons						
07	Self-Sufficiency		$	-		$	-
08	Energy Loan Amortization		$	-		$	-
09	PILOT		$	-		$	7,113
10	Cost of Audit		$	-		$	3,850
11	Resident Participation		$	500		$	1,000
12	Asset Management Fee		$	960		$	1,920
13	Information Technology Fee		$	480		$	960
14	Asset Repositioning Fee						
15	Changes in law, etc.		$	-		$	-
16	**Total Add-ons**		**$**	**1,940**		**$**	**14,843**
17	**Total Formula Expenses**		**$**	**95,496**		**$**	**217,695**
	Formula Income						
01	PUM Formula Income		$	83.92		$	165.05
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income		$	83.92		$	165.05
04	**Total Formula Income**		**$**	**20,141**		**$**	**79,224**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**		**$**	**-**		**$**	**-**
	Calculation of Formula Amount						
01	Formula Calculation		$	75,355		$	138,471
02	Cost of Audit		$	-		$	3,850
03	**Formula Amount**		**$**	**75,355**		**$**	**138,471**
	100%			6,279.58			11,539.25
	88.96%	67,036		5,586.32	123,184		10,265.32

Housing Authority of the City of Charlotte
CY 2009 AMP Operating Subsidy

Appendix F

Section 2

		AMP #33 Mayfield Terrace (Nia Point)			AMP #35 Arbor Glen III		
	ACC Units 7/1/2006			29			12
	Additions						
	Deletions						
	ACC Units 6/30/2007			**29**			**12**
	Occupied Unit Months						
01	Occupied Units	345	345	345	144	144	144
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		-	-	
07	Litigation	-	-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	3			-		
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		3			-	
15	**Total Unit Months**	**348**	**348**	**345**	**144**	**144**	**144**
16	Resident Participation Units	-		29	-		12
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3

	Project Expense Level						
01	PEL			$ 349.25			$ 356.08
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 360.78			$ 367.83
04	**PEL**			**$ 125,551**			**$ 52,968**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 58.17			$ 46.47
06	**UEL**			**$ 20,243**			**$ 6,692**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ -			$ -
09	PILOT			$ 5,261			$ 1,625
10	Cost of Audit			$ 3,133			$ 1,690
11	Resident Participation			$ 725			$ 300
12	Asset Management Fee			$ 1,392			$ 576
13	Information Technology Fee			$ 696			$ 288
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 11,207**			**$ 4,479**
17	**Total Formula Expenses**			**$ 157,001**			**$ 64,139**
	Formula Income						
01	PUM Formula Income			$ 138.91			$ 162.33
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 138.91			$ 162.33
04	**Total Formula Income**			**$ 48,341**			**$ 23,376**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 108,660			$ 40,763
02	Cost of Audit			$ 3,133			$ 1,690
03	**Formula Amount**			**$ 108,660**			**$ 40,763**
	100%			9,055.00			3,396.92
	88.96%		96,664	8,055.33		36,263	3,021.90

Housing Authority of the City of Charlotte
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Appendix F

		AMP #37 Seigle 60 (McAden Park)			AMP #38 Stonehaven		
Section 2							
	ACC Units 7/1/2006			30			24
	Additions						
	Deletions						
	ACC Units 6/30/2007			**30**			**24**
	Occupied Unit Months						
01	Occupied Units	358	358	358	284	284	284
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		-	-	
07	Litigation	-	-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	2			4		
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		2			4	
15	**Total Unit Months**	**360**	**360**	**358**	**288**	**288**	**284**
16	Resident Participation Units	-		30	-		24
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3							
	Project Expense Level						
01	PEL			$ 348.31			$ 303.95
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 359.80			$ 313.98
04	**PEL**			**$ 129,528**			**$ 90,426**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 33.18			$ 52.00
06	**UEL**			**$ 11,945**			**$ 14,976**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ -			$ -
09	PILOT			$ 18,106			$ -
10	Cost of Audit			$ -			$ -
11	Resident Participation			$ 750			$ 600
12	Asset Management Fee			$ 1,440			$ 1,152
13	Information Technology Fee			$ 720			$ 576
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 21,016**			**$ 2,328**
17	**Total Formula Expenses**			**$ 162,489**			**$ 107,730**
	Formula Income						
01	PUM Formula Income			$ 163.26			$ 182.14
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 163.26			$ 182.14
04	**Total Formula Income**			**$ 58,774**			**$ 52,456**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 103,715			$ 55,274
02	Cost of Audit			$ -			$ -
03	**Formula Amount**			**$ 103,715**			**$ 55,274**
	100%			8,642.92			4,606.17
	88.96%		92,265	7,688.74		49,172	4,097.65

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Appendix F

		AMP #39 Montgomery Gardens			AMP #40 Prosperity Creek		
Section 2							
	ACC Units 7/1/2006			20			72
	Additions						
	Deletions						
	ACC Units 6/30/2007			**20**			**72**
	Occupied Unit Months						
01	Occupied Units	238	238	238	864	864	864
02	Occupied Units by police	-		-	-		-
03	New units in funding period	-	-	-	-	-	-
04	New units - Oct-Dec	-	-	-	-	-	-
	Vacant Unit Months						
05	Mod units	-	-		-	-	
06	Special Use Units	-	-		-	-	
07	Litigation	-	-		-	-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized	2			-		
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		2			-	
15	**Total Unit Months**	**240**	**240**	**238**	**864**	**864**	**864**
16	Resident Participation Units	-		20	-		72
	Special Provision for Utilities						
17	Unit Months		-			-	
Section 3							
	Project Expense Level						
01	PEL			$ 331.83			$ 250.41
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 342.78			$ 258.67
04	**PEL**			**$ 82,267**			**$ 223,491**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 55.15			$ 25.74
06	**UEL**			**$ 13,236**			**$ 22,239**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ -			$ -
09	PILOT			$ 2,050			$ 34,511
10	Cost of Audit			$ 2,275			$ -
11	Resident Participation			$ 500			$ 1,800
12	Asset Management Fee			$ 960			$ 3,456
13	Information Technology Fee			$ 480			$ 1,728
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 6,265**			**$ 41,495**
17	**Total Formula Expenses**			**$ 101,768**			**$ 287,225**
	Formula Income						
01	PUM Formula Income			$ 143.80			$ 138.62
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 143.80			$ 138.62
04	**Total Formula Income**			**$ 34,512**			**$ 119,768**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 67,256			$ 167,457
02	Cost of Audit			$ 2,275			$ -
03	**Formula Amount**			**$ 67,256**			**$ 167,457**
	100%			5,604.67			13,954.75
	88.96%		59,831	4,985.91		148,970	12,414.15

Housing Authority of the City of Charlotte
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Appendix F

		AMP #41 South Oak Crossing			AMP #42 Springfield Gardens		
Section 2							
	ACC Units 7/1/2006			20			22
	Additions						
	Deletions						
	ACC Units 6/30/2007			**20**			**22**
	Occupied Unit Months						
01	Occupied Units	22	22	22	264	264	264
02	Occupied Units by police			-			-
03	New units in funding period	218	218	218		-	-
04	New units - Oct-Dec	30	30	30		-	-
	Vacant Unit Months						
05	Mod units		-			-	
06	Special Use Units		-			-	
07	Litigation		-			-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized						
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		-			-	
15	**Total Unit Months**	**270**	**270**	**270**	**264**	**264**	**264**
16	Resident Participation Units	-		23	-		22
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3							
	Project Expense Level						
01	PEL			$ 297.18			$ 346.40
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 306.99			$ 357.83
04	**PEL**			**$ 82,887**			**$ 94,467**
	Utilities Expense Level						
05	PUM Utilities Expense			$ 45.80			$ 34.59
06	**UEL**			**$ 12,366**			**$ 9,132**
	Add-ons						
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ -			$ -
09	PILOT			$ -			$ 1,998
10	Cost of Audit			$ -			$ -
11	Resident Participation			$ 575			$ 550
12	Asset Management Fee			$ 1,080			$ 1,056
13	Information Technology Fee			$ 540			$ 528
14	Asset Repositioning Fee			$ -			$ -
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 2,195**			**$ 4,132**
17	**Total Formula Expenses**			**$ 97,448**			**$ 107,731**
	Formula Income						
01	PUM Formula Income			$ 143.80			$ 165.36
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 143.80			$ 165.36
04	**Total Formula Income**			**$ 38,826**			**$ 43,655**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
	Calculation of Formula Amount						
01	Formula Calculation			$ 58,622			$ 64,076
02	Cost of Audit			$ -			$ -
03	**Formula Amount**			**$ 58,622**			**$ 64,076**
	100%			4,885.17			5,339.67
	88.96%		52,150	4,345.84		57,002	4,750.17

Housing Authority of the City of Charlotte
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Appendix F

		AMP #44 940 Brevard			AMP #45 Seigle Point Apartments		
Section 2							
ACC Units 7/1/2006				-			-
Additions				40			102
Deletions							
ACC Units 6/30/2007				**40**			**102**
Occupied Unit Months							
01	Occupied Units		-	-		-	-
02	Occupied Units by police			-			-
03	New units in funding period	480	480	480	928	928	928
04	New units - Oct-Dec	112	112	112	157	157	157
Vacant Unit Months							
05	Mod units		-			-	
06	Special Use Units		-			-	
07	Litigation		-			-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized						
Other ACC							
12	Eligible for Asset Repo Fee						
13	All Other						
Calculations							
14	Limited Vacancies		-			-	
15	**Total Unit Months**	**592**	**592**	**592**	**1,085**	**1,085**	**1,085**
16	Resident Participation Units			49			90
Special Provision for Utilities							
17	Unit Months		-			-	
Section 3							
Project Expense Level							
01	PEL			$ 263.29			$ 367.43
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL			$ 271.98			$ 379.56
04	**PEL**			**$ 161,012**			**$ 411,823**
Utilities Expense Level							
05	PUM Utilities Expense			$ 25.74			$ 52.28
06	**UEL**			**$ 15,238**			**$ 56,724**
Add-ons							
07	Self-Sufficiency			$ -			$ -
08	Energy Loan Amortization			$ -			$ -
09	PILOT			$ -			$ -
10	Cost of Audit			$ -			$ -
11	Resident Participation			$ 1,225			$ 2,250
12	Asset Management Fee			$ 2,368			$ 4,340
13	Information Technology Fee			$ 1,184			$ 2,170
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -			$ -
16	**Total Add-ons**			**$ 4,777**			**$ 8,760**
17	**Total Formula Expenses**			**$ 181,027**			**$ 477,307**
Formula Income							
01	PUM Formula Income			$ 165.09			$ 195.25
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ 165.09			$ 195.25
04	**Total Formula Income**			**$ 97,733**			**$ 211,846**
Other Formula Provisions							
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**			**$ -**
Calculation of Formula Amount							
01	Formula Calculation			$ 83,294			$ 265,461
02	Cost of Audit			$ -			$ -
03	**Formula Amount**			**$ 83,294**			**$ 265,461**
	100%						
	88.96%		74,098	6,174.86		236,154	19,679.51

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Appendix F

		AMP #46 Springcroft at Ashley Park			AMP #48 McAlpine Terrace Apartments		
Section 2							
	ACC Units 7/1/2006			-			-
	Additions			18			26
	Deletions						
	ACC Units 6/30/2007			**18**			**26**
	Occupied Unit Months						
01	Occupied Units		-	-		-	-
02	Occupied Units by police			-			-
03	New units in funding period		-	-	65	65	65
04	New units - Oct-Dec		-	-		-	-
	Vacant Unit Months						
05	Mod units		-			-	
06	Special Use Units		-			-	
07	Litigation		-			-	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized						
	Other ACC						
12	Eligible for Asset Repo Fee						
13	All Other						
	Calculations						
14	Limited Vacancies		-			-	
15	**Total Unit Months**	**-**	**-**	**-**	**65**	**65**	**65**
16	Resident Participation Units			-			5
	Special Provision for Utilities						
17	Unit Months		-			-	
Section 3							
	Project Expense Level						
01	PEL					$	249.46
02	Inflation Factor			1.03300			1.03300
03	Inflated PEL					$	257.69
04	**PEL**					**$**	**16,750**
	Utilities Expense Level						
05	PUM Utilities Expense					$	25.73
06	**UEL**			**$ -**		**$**	**1,672**
	Add-ons						
07	Self-Sufficiency			$ -		$	-
08	Energy Loan Amortization			$ -		$	-
09	PILOT			$ -		$	-
10	Cost of Audit			$ -		$	-
11	Resident Participation			$ -		$	125
12	Asset Management Fee			$ -		$	260
13	Information Technology Fee			$ -		$	130
14	Asset Repositioning Fee						
15	Changes in law, etc.			$ -		$	-
16	**Total Add-ons**			**$ -**		**$**	**515**
17	**Total Formula Expenses**			**$ -**		**$**	**18,937**
	Formula Income						
01	PUM Formula Income					$	165.09
02	PUM Change in Utility Allow			-			-
03	Pum Adj Formula Income			$ -		$	165.09
04	**Total Formula Income**			**$ -**		**$**	**10,731**
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**		**$**	**-**
	Calculation of Formula Amount						
01	Formula Calculation			$ -		$	8,206
02	Cost of Audit			$ -		$	-
03	**Formula Amount**			**$ -**		**$**	**8,206**
	100%						
	88.96%		-	-		7,300	608.34

Housing Authority of the City of Charlotte
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Appendix F

		AMP #49 Glen Cove Apartments			Total AMPS		
Section 2							
	ACC Units 7/1/2006			-			3,091
	Additions			10			196
	Deletions						-
	ACC Units 6/30/2007			**10**			**3,287**
	Occupied Unit Months						
01	Occupied Units		-	-	33,654	33,654	33,654
02	Occupied Units by police			-	60		60
03	New units in funding period	110	110	110	1,801	1,801	1,801
04	New units - Oct-Dec		-	-	299	299	299
	Vacant Unit Months						
05	Mod units		-		1,049	1,049	
06	Special Use Units		-		312	312	
07	Litigation		-		1,500	1,500	
08	Disasters	-	-		-	-	
09	Casualty Loss	-	-		-	-	
10	Changing Market Condition	-	-		-	-	
11	Vacant, not categorized				299		
	Other ACC						
12	Eligible for Asset Repo Fee				384		
13	All Other						
	Calculations						
14	Limited Vacancies		-			299	
15	**Total Unit Months**	**110**	**110**	**110**	**39,358**	**38,914**	**35,814**
16	Resident Participation Units			9			2,986
	Special Provision for Utilities						
17	Unit Months		-			-	

Section 3							
	Project Expense Level						
01	PEL			$ 345.42			
02	Inflation Factor			1.03300			
03	Inflated PEL			$ 356.82			
04	**PEL**			**$ 39,250**		$	13,484,390
	Utilities Expense Level						
05	PUM Utilities Expense			$ 40.30			
06	**UEL**			**$ 4,433**		$	4,915,338
	Add-ons						
07	Self-Sufficiency			$ -		$	-
08	Energy Loan Amortization			$ -		$	190,527
09	PILOT			$ -		$	272,447
10	Cost of Audit			$ -		$	51,309
11	Resident Participation			$ 225		$	74,650
12	Asset Management Fee			$ 440	157,432	$	157,432
13	Information Technology Fee			$ 220		$	78,716
14	Asset Repositioning Fee					$	32,508
15	Changes in law, etc.			$ -		$	-
16	**Total Add-ons**			**$ 885**		**$**	**857,589**
17	**Total Formula Expenses**			**$ 44,568**		**$**	**19,257,317**
	Formula Income						
01	PUM Formula Income			$ 244.22			
02	PUM Change in Utility Allow			-			
03	Pum Adj Formula Income			$ 244.22			
04	**Total Formula Income**			**$ 26,864**		$	6,314,298
	Other Formula Provisions						
01	Moving to work			-			-
02	Transition Funding						
03	Other						
04	**Total Other Formula Provis**			**$ -**		**$**	**-**
	Calculation of Formula Amount						
01	Formula Calculation			$ 17,704		$	12,943,019
02	Cost of Audit			$ -		$	51,309
03	**Formula Amount**			**$ 17,704**		**$**	**12,943,019**
	100%						
	88.96%		15,749	1,312.46	**88.96%**		**11,514,110**

APPENDIX H

2009 - 2010 Planned Capital Projects

Development # /Name	General Description of Major Work Categories	Quantity	Estimated Cost	Budget
3-3 Southside	Interior Reno of Remaining 40 Units	40	$ 2,300,000	CP
3-3 Southside	Parking Lot Resurfacing	LS	$ 75,000	CP
3-3 Southside Total			**$ 2,375,000**	
3-6 Edwin Towers	Parking Lot Resurfacing	LS	$ 7,500	CP
3-6 Edwin Towers	Replace Window Seals	LS	$ 110,000	CP
3-6 Edwin Towers Total			**$ 117,500**	
3-7 Strawn	Replace HVAC Thru-Wall Units (40)	23	$ 32,000	AMP
3-7 Strawn	Replace Tile on 2 floors	LS	$ 10,000	AMP
3-7 Strawn	Strawn CFFP Debt Service (30% of Strawn Allocation)	LS	$ 120,299	CP
3-7 Strawn Total			**$ 162,299**	
3-12 Dillehay	Expand Community Center	LS	$ 300,000	CP
3-12 Dillehay	Replace furnances	10	$ 12,000	AMP
3-12 Dillehay	Rebuild Interior Stairs	15 units	$ 25,000	AMP
3-12 Dillehay	Gutter replacement throughout site	LS	$ 70,000	AMP
3-12 Dillehay	Increase attic installation throughout site	LS	$ 105,000	AMP
3-12 Dillehay	Painting of occupied units	85	$ 102,000	AMP
3-12 Dillehay	Install iron fence along Pine Street	LS	$ 15,000	AMP
3-12 Dillehay	Replace ranges	50	$ 12,500	AMP
3-12 Dillehay	Replace refrigerators	25	$ 10,000	AMP
3-12 Dillehay	Sealcoat stripe, patches to parking lot	LS	$ 125,000	CP
3-12 Dillehay Total			**$ 776,500**	
3-16 Leafcrest	Removal of dead trees, Clearing of debris	LS	$ 36,000	AMP
3-16 Leafcrest Total			**$ 36,000**	
3-17 Meadow Oaks	Replace storage building	LS	$ 8,000	AMP
3-17 Meadow Oaks	Sealcoat stripe, patches to parking lot	LS	$ 12,000	CP
3-17 Meadow Oaks	Increase attic installation throughout site	LS	$ 18,000	AMP
3-17 Meadow Oaks	Replace Appliances (Range & Hood, Refrigerator)	32	$ 22,400	AMP
3-17 Meadow Oaks	Remove Baseboard Heat and Install New Central HVAC (all units)	32	$ 240,000	CP
3-17 Meadow Oaks	Relocation	32	$ 38,400	CP
3-17 Meadow Oaks	Paint Interior of Units	32	$ 40,000	CP
3-17 Meadow Oaks Total			**$ 378,800**	
3-17 Sunridge	Parking Lot Resurfacing	LS	$ 25,000	CP
3-17 Sunridge	Replace Appliances (Range & Hood, Refrigerator)	20	$ 14,000	AMP
3-17 Sunridge	Replace Water Heaters	20	$ 7,000	AMP
3-17 Sunridge	Attic installation	LS	$ 25,000	AMP
3-17 Sunridge	Interior painting	20	$ 30,000	AMP
3-17 Sunridge Total			**$ 101,000**	
3-18 Charlottetowne	Replace HVAC Thru-Wall Units (30)	30	$ 42,000	AMP
3-18 Charlottetowne	Charlottetown CFFP Debt Service (30% of Charlottetown Allocation)		$ 65,064	CF
3-18 Charlottetowne	Interor Painting - 50 units		$ 50,000	AMP
3-18 Charlottetowne	Parking Lot Resurfacing	LS	$ 25,000	CP
3-18 Charlottetowne Total			**$ 182,064**	
3-19 Parktowne	Replace Common Area Floor Covering	LS	$ 25,000	AMP
3-19 Parktowne	Parking Lot Resurfacing	LS	$ 10,000	CP

APPENDIX H

2009 - 2010 Planned Capital Projects

Development # /Name	General Description of Major Work Categories	Quantity	Estimated Cost	Budget
3-19 Parktowne Total			**$ 35,000**	
3-20 Tall Oaks	Replace Appliances (Range & Hood, Refrigerator)	29	$ 20,300	AMP
3-20 Tall Oaks	Site Work - Exterior Lighting	LS	$ 2,388	AMP
3-20 Tall Oaks Total			**$ 22,688**	
3-21 Robinsdale	Interior Reno of Remaining 20 Units	20	$ 600,000	CP
3-21 Robinsdale	Purchase Replacement Maintenance Truck	1	$ 20,000	AMP
3-21 Robinsdale Total			**$ 620,000**	
3-21 Mallard Ridge	Replace Gutters	LS	$ 30,000	AMP
3-21 Mallard Ridge Total			**$ 30,000**	
3-21 Savanna	Repairs to interior stairs	10	$ 15,000	AMP
3-21 Savanna	Replace furnances	10	$ 15,000	AMP
3-21 Savanna	Replace Appliances (Range & Hood, Refrigerator)	10	$ 7,000	AMP
3-21 Savanna Total			**$ 37,000**	
3-23 Tarlton Hills	Site Work - Exterior Lighting	LS	$ 5,712	AMP
3-23 Tarlton Hills	Replace Appliances (Range & Hood, Refrigerator)	29	$ 20,300	AMP
3-23 Tarlton Hills	Purchase Replacement Maintenance Truck	1	$ 20,000	AMP
3-23 Tarlton Hills Total			**$ 46,012**	
3-24 Robinsdale	Parking Lot Resurfacing	LS	$ 10,000	CP
3-24 Robinsdale Total			**$ 10,000**	
3-25 Gladedale	Parking Lot Resurfacing	LS	$ 12,000	CP
3-25 Gladedale	Replace Ranges/Refrigerators	50	$ 38,750	AMP
3-25 Gladedale	Replace Remaing Countertops	25	$ 30,000	AMP
3-25 Gladedale	Bathroom Upgrades	50	$ 60,000	CP
3-25 Gladedale Total			**$ 140,750**	
3-26 Wallace Woods	Interior Renovation (including addition of A/C @ $37,000/unit)	48	$ 1,776,000	CP
3-26 Wallace Woods	Relocation (48 residents @ $1100)	48	$ 52,800	CP
3-26 Wallace Woods Total			**$ 1,828,800**	
3-28 Claremont	Parking Lot Resurfacing	LS	$ 10,000	CP
3-28 Claremont Total			**$ 10,000**	
3-29 Victoria Square	Replace Water Heaters	20	$ 6,000	AMP
3-29 Victoria Square	Parking Lot Resurfacing	LS	$ 10,000	CP
3-29 Victoria Square Total			**$ 16,000**	
Grand Total			**$ 6,925,413**	

APPENDIX I

Charlotte Housing Authority
Demolition/Disposition Activity

Demolition/Disposition Activity Description
1a. Development name: **First Ward Place (formerly: Earle Village)**
1b. Development (project) number: 3-05
2. Activity type: ____ Demolition X Disposition
3. Application status X Approved ____ Submitted, pending approval ____ Planned application Note: CHA has received disposition of remaining vacant land in First Ward including 080-063-08, 0.903 acres; a 1.12 acre portion of 080-056-01; a portion of 080-081-01; 0.2 acres of 080-081-05; 0.5 acres of 080-081-02 and 2.48 acres of 080-082-15.
4. Date application approved, submitted, or planned for submission: 12/01-2002
5. Number of units affected: None 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008-2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Edwin Towers**
1b. Development (project) number: 3-06
2. Activity type: ____ Demolition X Disposition
3. Application Status Approved Submitted, pending * X Planned application
4. Date application approved, submitted, or planned for submission: 2008 – 2013
5. Number of units affected: None 6. Coverage of action X Part of the development Total development
7. Timeline for Activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

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Demolition/Disposition Activity Description
1a. Development name: Strawn Apartments
1b. Development (project) number: 3-07
2. Activity type: ___ Demolition X Disposition
3. Application status Approved Submitted, pending approval * X Planned application
4. Date application approved, submitted, or planned for submission 2008-2013

Demolition/Disposition Activity Description
1a. Development name: **Central Office**
1b. Development (project) number: 3-07
2. Activity type: ___ Demolition ___ Disposition X Transfer to COCC
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: None 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Arbor Glen 50 Units and FIC Building**
1b. Development (project) number: 3-09
2. Activity type: Demolition X Disposition
3. Application status X Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 10/1/06 Approved
5. Number of units affected: 50 Units and FIC Building
6. Coverage of action X Part of the development

Total development
7. Timeline for activity: a. Actual or projected start date of activity: 11-15-03 b. Projected end date of activity: 12-31-09

Demolition/Disposition Activity Description
1a. Development name: **Boulevard Homes**
1b. Development (project) number: 3-11
2. Activity type: X Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 300 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Dillehay Courts**
1b. Development (project) number: 3-12 2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 136 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Cedar Knoll**
1b. Development (project) number: 3-16N

2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 49 6. Coverage of action X Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Charlottetown Terrace**
1b. Development (project) number: 3-18
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 180 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Parktowne Terrace**
1b. Development (project) number: 3-19
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 164

6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Tall Oaks**
1b. Development (project) number: 3-20
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 79 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Savanna Woods**
1b. Development (project) number: 3-21M
2. Activity type: X Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 49 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 – 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description

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1a. Development name: **Live Oak**
1b. Development (project) number: 3-21S
2. Activity type: X Demolition Disposition
3. Application status X Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 2006
5. Number of units affected: 32 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2006 b. Projected end date of activity: 2010

Demolition/Disposition Activity Description
1a. Development name: **Hall House**
1b. Development (project) number: 3-22
2. Activity type: X Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2006 - 2013
5. Number of units affected: 191 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2006 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Tarlton Hills**
1b. Development (project) number: 3-23
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application

4. Date application approved, submitted, or planned for submission: 2008 - 2013

Demolition/Disposition Activity Description
1a. Development name: **Gladedale**
1b. Development (project) number: 3-25
2. Activity type: X Demolition X Disposition
3. Application status Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 49 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008 - 2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Central Maintenance**
1b. Development (project) number: 3-31
2. Activity type: Demolition Disposition X Transfer to COCC
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 0 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008-2013 b. Projected end date of activity: 2013

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Demolition/Disposition Activity Description
1a. Development name: **Claremont**
1b. Development (project) number: 3-93
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 50 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008-2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Victoria Square**
1b. Development (project) number: 3-95
2. Activity type: Demolition X Disposition
3. Application status Approved Submitted, pending approval X Planned application
4. Date application approved, submitted, or planned for submission: 2008-2013
5. Number of units affected: 32 6. Coverage of action Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2008-2013 b. Projected end date of activity: 2013

Demolition/Disposition Activity Description
1a. Development name: **Turnkey III Program – Single Family Homes**
1b. Development (project) number: NC003-14, NC003-15
2. Activity type: X Demolition X Disposition
3. Application status Approved

X Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 2006
5. Number of units affected: 5 6. Coverage of action X Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2006 b. Projected end date of activity: 2009

APPENDIX J
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			Project Name	Type	Financing	0BR	1BR	2BR	3BR	4BR	5BR	Total Units	Total BRS
Mixed/Afford.	Private	31	Park at Oaklawn	Family	Mixed			46	39	4		**89**	**225**
Family	CHA	3	Southside Homes	Family	All ACC		62	227	82	10		**381**	**802**
Seniors	CHA	5	Autumn Place	Seniors	All ACC		65	3				**68**	**71**
Mixed/Afford.	Private	5A	First Ward Place	Family	Mixed		8	68	43	12	1	**132**	**326**
Seniors	CHA	6	Edwin Towers	Seniors	All ACC	64	95	15				**174**	**189**
Seniors	CHA	7	Strawn Hi-Rise	Seniors	All ACC	138	57	1				**196**	**197**
Seniors	CHA	7	Strawn Cottages	Seniors	All ACC	82	40					**122**	**122**
Mixed/Afford.	Private	9	Arbor Glen				4	6	13	2		**25**	**63**
Mixed/Afford.	Private	9	Arbor Glen I	Family	Mixed		42	12	6			**60**	**84**
Mixed/Afford.	Private	32	Arbor Glen II	Family	Mixed			27	13			**40**	**93**
Mixed/Afford.	Private	35	Arbor Glen III	Family	Mixed			8	4			**12**	**28**
Family	CHA	11	Boulevard Homes	Family	All ACC		40	77	96	65	20	**298**	**842**
Family	CHA	12	Dillehay Courts	Family	All ACC			12	67	48	8	**135**	**457**
Family	CHA	15	Pine Valley									**0**	
Family	CHA	16A	Leafcrest	Family	All ACC		4	16	24	4		**48**	**124**
Family	CHA	16N	Cedar Knoll	Family	All ACC		5	14	25	5		**49**	**128**
Family	CHA	17	Meadow Oaks	Family	All ACC		2	12	16	2		**32**	**82**
Family	CHA	17	Sunridge	Family	All ACC		4	14	22	4		**44**	**114**
Seniors	CHA	18	Charlottetown Terrac	Seniors	All ACC	139	39					**178**	**178**
Seniors	CHA	19	Parktowne Terrace	Seniors	All ACC	131	32					**163**	**163**
Family	CHA	20	Tall Oaks	Family	All ACC		14	26	25	13		**78**	**193**
Mixed/Afford.	Private		Live Oak Seniors	Seniors	All ACC		18					**18**	**18**
Mixed/Afford.	Private		Live Oak Multi-family	Family	Mixed			22				**22**	**44**
Family	CHA	21M	Savanna Woods	Family	All ACC		9	17	17	6		**49**	**118**
Family	CHA	21P	Mallard Ridge	Family	All ACC		6	12	12	5		**35**	**86**
Seniors	CHA	22	Hall House	Seniors	All ACC	60	130					**190**	**190**
Family	CHA	23	Tarlton Hills	Family	All ACC		2	8	8	3		**21**	**54**
Family	CHA	24	Robinsdale	Family	All ACC			8	21			**29**	**79**
Family	CHA	25	Gladedale	Family	All ACC		9	18	16	6		**49**	**117**
Family	CHA	26	Wallace Woods	Family	All ACC			12	35			**47**	**129**
Family	CHA	93	Claremont	Family	All ACC		10	20	15	4		**49**	**111**
Family	CHA	95	Victoria Square	Family	All ACC		4	14	9	4		**31**	**75**
Mixed/Afford.	Private	38	Stonehaven East	Family	Mixed		6	16	2			**24**	**44**
Mixed/Afford.	Private	31	Rivermere	Family	Mixed			12	8			**20**	**48**
Mixed/Afford.	Private	39	Montgomery Garden	Family	Mixed			14	6			**20**	**46**
Mixed/Afford.	Private		Glen Cove	Family	Mixed			5	5			**10**	**25**
Mixed/Afford.	Private	33	Nia Point	Family	Mixed			16	13			**29**	**71**
Mixed/Afford.	Private	42	Springfield Gardens	Family	Mixed			11	11			**22**	**55**
Mixed/Afford.	Private	40	Prosperity Creek	Family	Mixed		72					**72**	**72**
Mixed/Afford.	Private	41	South Oak Crossing	Family	Mixed			10	10			**20**	**50**
Mixed/Afford.	Private		Crossings at Seigle I	Family	Mixed		6	42	54			**102**	**252**
Mixed/Afford.	Private		McAlpine Terrace	Seniors	Mixed		26					**26**	**26**
Mixed/Afford.	Private	37	McAden Park	Family			3	18	9			**30**	**66**
Mixed/Afford.	Private		940 Brevard	Seniors			40					**40**	**40**
	Private		Fairmarket Square	Family				8	8			**16**	**40**
			Totals for ACC Units			**614**	**854**	**867**	**734**	**197**	**29**	**3295**	**6337**
Mixed/Afford.			Oak Valley	Family	Affordable			32	18			**50**	**118**
Mixed/Afford.			Valley View	Family	Affordable			30	20			**50**	**120**
Mixed/Afford.			Grove Place	Family	Affordable			24	12			**36**	**84**
Mixed/Afford.			Seneca Woods	Family	Affordable			24	24	2		**50**	**128**
			Total					**110**	**74**	**2**		**186**	**450**
			Totals			**614**	**854**	**977**	**808**	**199**	**29**	**3481**	**6787**

APPENDIX J

CHA DEVELOPMENT LISTING

Mgmt.	*Community Name*	*Address*	*Housing Type*
Private	940 Brevard	940 Brevard St, 28202	Senior
Private	Arbor Glen	2305 Farmer St., 28208	HOPE VI
Private	Arbor Glen I	2305 Farmer St., 28208	HOPE VI
Private	Arbor Glen II	2305 Farmer St., 28208	HOPE VI
Private	Arbor Glen III	2305 Farmer St., 28208	HOPE VI
CHA	Autumn Place	321 N. Davidson St, 28202	Senior
CHA	Boulevard Homes	1620 Brooksvale St, 28208	Conventional
CHA	Cedar Knoll	304 Green Needles Ct., 28217	Conventional
CHA	Charlottetown Terrace	1000 Baxter Street, 28204	Senior/Disabled
CHA	Claremont	1032-F Coliseum Drive, 28205	Conventional
Private	Crossings at Seigle Point	831 Seigle Avenue, 282	HOPE VI
CHA	Dillehay Courts	2600 N. Pine Street, 28206	Conventional
CHA	Edwin Towers	201 W. 10th St, 28202	Senior/Disabled
Private	Fairmarket Square	5914 Fairmarket Place, 28215	Mixed Income
Private	First Ward Place	550 East 8th St, 28202	HOPE VI
CHA	Gladedale	5805 Olde Providence Rd., 28226	Conventional
Private	Glen Cove	6130 Pineburr Road, 28211	Mixed Income
CHA	Grove Place	6509 A W.T. Harris Blvd, 28215	Mixed Income
CHA	Hall House	426 N. Tryon St, 28202	Senior/Disabled
CHA	Leafcrest	6513 Leafcrest Lane, 28210	Conventional
Private	Ashley Park	6722 Oakengate Lane, 28210	Mixed Income
Private	SpringCroft at Ashley Park	6722 Oakengate Lane, 28210	Senior
CHA	Mallard Ridge	1428 Axminster Ct, 28210	Conventional
Private	McAden Park	825 E. 16th St and 901 E. 15th St, 2820	Mixed Income
Private	McAlpine Terrace	6130 Pineburr Road, 28211	Mixed Income
CHA	Meadow Oaks	6011 Florence Ave, 28212	Conventional
Private	Montgomery Gardens	5200 Beatties Ford Road, 28216	Mixed Income
Private	Nia Point	2618 Pitts Drive, 28216	Mixed Income
CHA	Oak Valley	2700 Oakvalley Lane, 28205	Mixed Income
Private	Park at Oaklawn	1215 Rising Oak Drive, 28206	HOPE VI
CHA	Parktowne Terrace	5800 Fairview Road, 28209	Senior/Disabled
CHA	Pine Valley	1700 Longleaf Drive, 28210	Mixed Income
Private	Prosperity Creek	3701 Prosperity Church Road, 28269	Senior
Private	Rivermere	3404 Dunn Commons Pkwy, 28216	Mixed Income
CHA	Robinsdale	1001 Margie Ann Drive, 28215	Conventional
CHA	Savanna Woods	3124 Leaside Lane, 28209	Conventional
Private	Seneca Woods	1509 Seneca Place, 28209	Mixed Income
Private	South Oak Crossing	7609 Old Pineville Road	Mixed Income
CHA	Southside Homes	3400 Griffith St, 28203	Conventional
Private	Springfield Gardens	9600 Idlewild Road, 28227	Mixed Income
Private	Stonehaven East	7000 Fernwood Drive, 28211	Mixed Income
CHA	Strawn Cottages	1225 S. Caldwell St, 28203	Senior/Disabled
CHA	Strawn Hi-Rise	1225 S. Caldwell St, 28203	Senior/Disabled
CHA	Sunridge	4005 Sunridge Lane, 28215	Conventional
CHA	Tall Oaks	407 Baldwin Avenue, 28204	Conventional
CHA	Tarlton Hills	201 Frazier Avenue, 28216	Conventional
CHA	Valleyview	5117-A Hickory Valley Ct, 28212	Mixed Income
CHA	Victoria Square	225-D N Clarkson St, 28202	Conventional
CHA	Villa Courts	820-F Villa Court Lane, 28211	Project Based Section 8
CHA	Wallace Woods	7120 C Wallace Road, 28212	Conventional