



Sarasota Housing Authority (SHA)
Board of Commissioners
269 S. Osprey Avenue, #100, Sarasota, FL 34236

AGENDA

Regular Meeting of the Board
June 28, 2023, 4:30 P.M.

NOTES

- I. CALL TO ORDER**
- II. INVOCATION**
- III. PLEDGE OF ALLEGIANCE**
- IV. ROLL CALL**
- V. APPROVAL OF MINUTES – Accepted By Consent**
 - A. Regular Board Meeting – March 29, 2023
 - B. Special Board Meeting – April 19, 2023
- VI. SPECIAL PRESENTATIONS**
 - A. Recognition of 4-H Awards to SHA Children
 - B. Team Member of the Quarter (2nd Quarter)
- VII. PUBLIC PRESENTATIONS**
- VIII. RESOLUTIONS – Accepted By Consent**
 - A. Res 23-07: ACOP Revisions
 - B. Res 23-08: HCV Admin Plan Revisions
 - C. Res 23-09: Culture Guide Revisions
- IX. OLD BUSINESS**
 - A. Business Terms for Sarasota Housing Authority Agency-Wide Resident Council (SHAARC) MOU

X. **NEW BUSINESS**

- A. Advisory Board Training (2 Hour Training)-Select Date
- B. Board Consent to Appoint Ken Waters to COO / Deputy Director

XI. **PROGRAM UPDATES – Accepted By Consent**

- A. Monthly Financial Statements
 - SHA
 - Janie’s Garden
- B. Board Committee Meeting Minutes (None)
- C. Housing Choice Voucher Report
- D. Housing Management Reports
- E. Capital Improvement Report
- F. Resident Services Monthly Report

XII. **COMMISSIONER ANNOUNCEMENTS/COMMENTS**

XIII. **ADJOURNMENT**

Next Meeting: August 2, 2023 (Annual Meeting)



Sarasota Housing Authority
269 South Osprey Avenue
Sarasota, Florida 34236

Board Meeting
March 29, 2023
4:30 P.M.

I. **CALL TO ORDER:** Chair Jack Meredith called the meeting of the Sarasota Housing Authority Board of Commissioners to order at 4:32 pm.

II. **INVOCATION**

III. **PLEDGE OF ALLEGIANCE**

IV. **ROLL CALL**

Commissioners Present: Chair Jack Meredith, Vice Chair Ernestine Taylor, Commissioner John Colón (in at 4:45 pm), Commissioner Deborah Sargent, Commissioner Carolyn Mason and Commissioner Duane Finger

Commissioners Not Present: Commissioner Mark Vengroff (Excused)

Attendees: Attorney Rhonda Stringer (via Zoom), Attorney Ric Gilmore (via Zoom-out at 5:45 pm), City Commissioner Jen Ahearn-Koch, Valerie Buchand, Rachel Johnson, Agnes Kirkland, Elena Andrews and Joe Chambers (in at 5:50 pm)

SHA Personnel: William Russell, Rick Toney, Andrea Keddell and Ken Waters (in at 5:05 pm/out at 5:48 pm)

V. **APPROVAL OF MINUTES**

A. SHA Regular Board Meeting – February 15, 2023: Chair Meredith put up the minutes from the February 15, 2023, Regular Board Meeting for approval.

- Commissioner Sargent took a moment to inquire about items that were discussed at the Board Retreat that were not included in the minutes. Chair Meredith responded that he had just provided an overview at the February 15 meeting and that not all the items from the Retreat were discussed. He further explained that he had planned sending out the Retreat Minutes and Goals that were discussed as soon as he has them typed up and that he will make a note of the items that Commissioner Sargent mentioned. Once they're sent out if any Commissioner feels that something is missing it can be edited at that time.
- Commissioner Mason made a motion to approve the minutes. Commissioner Finger seconded the motion.
 - Motion was voted on and passed unanimously.

VI. **SPECIAL PRESENTATION**

A. None

VII. **PUBLIC PRESENTATION**

A. Ms. Valerie Buchand addressed the board:

- Ms. Buchand requested that the Board table the Resident Council MOU one more time and pointed out that she did not agree with the descriptions of some of the Business Terms listed in the Board Packet for discussion. She specifically mentioned that the Resident Council brought in the doctors and shared the office with them. She further maintained that “Ms. Champagne” was the one to state that the Housing Authority and Council do not work together and created the hostile work environment. She stated she’s going to meet with HUD on this issue and let HUD decide the outcome.
- Ms. Buchand added that they are an Agency-Wide Resident Council and want to include the RAD units, Voucher Holders and other Developments (all residents).
- B. Ms. Donna Rochleau addressed the board regarding Parking and Cameras at McCown/Annex. She states it’s understandable that spaces are taken up by construction but it’s becoming very difficult to find parking. The security guard that use to assist in keeping local hotel guests out of the lot is no longer there. The camera’s also don’t seem to be monitored. (Comments on this issue were discussed pre-meeting, prior to the start of the recording/meeting.)

VIII. RESOLUTIONS

- A. Res 23-03: Approval of Investment Policy
 - Commissioner Sargent made a motion to accept A. Resolutions 23-03. Commissioner Finger seconded the motion.
 - Commissioner Colón commented that it’s a HUD policy but that some of the items are antiquated. He’s in favor of the policy but he’d like to make some recommended changes. Under HUD Approved Investment Instruments starting on page 5 he recommended removal of:
 - 2. b. Mortgage-Backed Securities Program Mortgage-Backed Bonds (MBS)
 - 2. d. U.S. Government Guaranteed New Communities Act Debentures
 - 2. h. Maritime Administration Merchant Marine Bonds, Notes, and Obligations
 - 3. e. Federal National Mortgage Association Debentures
 - 3. g. FNMA Short-Term Discount Notes
 - 8. Super NOW Accounts
 - The list above are the current change requests, and should there be further changes, they can be brought before the board at a future date.
 - Commissioner Sargent amended her motion to add the revisions and requested an updated policy be sent out to the board. Commissioner Finger re-seconded the motion.
 - The motion was voted on and passed unanimously.
- B. Res 23-04: Collection Write Off
 - Commissioner Sargent inquired if there’s a need to have resident names on the reports in the board packet that is posted on the website and if the names could be redacted. Attorney Gilmore added that this is something that could be done but did remind the board that the names are public record and can be requested.
 - Commissioner Sargent made a motion to accept B. Resolutions 23-04 (with the names of the residents redacted from the report). Commissioner Finger seconded the motion.

- Commissioner Finger stated that in the past this was discussed and the names and reasoning behind the write-offs were listed to provide clarification for the commissioners. Attorney Gilmore suggested that this information could be available to the staff, and should a commissioner have an inquiry as to the reason for the write-off or amount of the write-off, staff could provide that information without the name being in the report.
 - The motion was voted on and passed (5 to 1). Commissioner Colón voted against removing the resident names from the Board Report.
- C. Res 23-05: FY 2024 Operating Budget
- Commissioner Meredith inquired if there was a budget line item for security services. Mr. Russell pointed out several line items that cover security services. Commissioner Sargent inquired about budgets for all the other entities that SHA assisted in developing. Mr. Russell explained that SHA doesn't control the budgets for Lofts on Lemon or Amaryllis and stated that he will look into providing a refresher presentation on SHA's portfolio, including SHA's role in the projects. He also informed the board that SHA is going back to merit-based salary increases and that 4% of the budgeted is for this plus 1% for possible promotions.
 - Commissioner Finger made a motion to accept Resolutions 23-05. Commissioner Colón seconded the motion.
 - The motion was voted on and passed unanimously.

IX. OLD BUSINESS

- A. Business Terms for Sarasota Housing Authority Agency-Wide Resident Council (SHAARC) MOU
- Mr. Russell explained that negotiations have been going back and forth for the MOU between SHA and the Agency-Wide Resident Council. He submitted a document outlining the final 3 items that need to be resolved and that he wanted to receive direction from the board in order to finalize the MOU.
 - Item 1 asks whether the Board agrees to go beyond the HUD regulations and provide funds to the Resident Council for Rental Assistance Demonstration (RAD) units/non-public housing properties.
 - Commissioner Meredith inquired about how much of the funding/budget goes for programming and events for residents and what percentage is used for stipends that go directly to Resident Council members. Questions were also raised as to what the Resident Council plans to do with any additional funds that would be approved, should they be approved.
 - Commissioner Sargent responded that the Resident Council hasn't been allowed to serve the residents at the new developments such as Amaryllis Park Place and Lofts on Lemon. Mr. Russell explained that per the HUD Resident Council regulation (24 CFR Part 964) Resident Council regulations only pertain to Public Housing & RAD projects, not Tax Credit or Section 8 properties.
 - The question was again raised as to what the Resident Council plans to do with any additional funds for the non-public housing properties, should they be approved. Would the funds go to resident programming or towards stipends for the Resident Council Members?

- Commissioner Sargent stated it would be for more activities. But she states the Council has been put on hold for the last 3 years from being allowed to communicate with residents. Commissioner Sargent deferred to the Council President, Valerie Buchand who was brought up to address the board concerns:
 - ✓ Commissioner Taylor again inquired about what the Resident Council plans to do with any additional funds for the non-public housing properties. Would the funds go to resident programming or towards stipends for the Resident Council Members? Ms. Buchand responded the Council hasn't received any other funds, that Council Members receive the \$79 +/- cents every month now and that they haven't thought about the increased amount. She added also that they've never received up to the \$200 per month allowed by the HUD regulations. She states the left-over funds after the stipends were paid are used for office supplies (paper, pens, etc.). Once that runs out, the Council would request additional funding from the Housing Authority to cover expenses in the office. She added that when the Council had the ROSS Grant, they didn't have the need to ask for additional funds from the Housing Authority. Ms. Buchand states that the reason they want all the Section 8 residents and other residents added is that they serve all SHA program participants, not just Public Housing.
 - ✓ Commissioner Mason inquired to Mr. Russell as to why the Council is not allowed to go into the Tax Credit properties and provide services. Attorney Gilmore suggested tabling this item and hashing out the specifics, getting them in writing. Commissioner Colón suggested all the Commissioners submit their questions to Mr. Russell who can provide the answers from the Resident Council and the Housing Authority at the next public meeting.
 - Commissioner Colón made a motion to table this item and have the written questions & responses reported at the next public meeting. Commissioner Mason seconded the motion.
 - The motion was voted on and passed unanimously.
- B. Lofts on Lemon Phase II Site Plan – Conceptual site plan was included in the board packet that was shared and discussed at the 3/14/23 Development Committee meeting. Mr. Russell went over the plans and major options for units and parking. The plan is for 7 stories (3 levels for parking and 4 levels for residential units with 1 live/work unit (approx. 1100 sq ft) on the 1st floor). The unit mix is slated to have 72 one-bedroom, 12 two-bedroom and 8 three-bedroom units for a total of 93 units.
- Mr. Chambers responded to an inquiry that there would be a shared-use agreement for parking and that the other phases could utilize the parking.
 - Discussion took place about the live/work unit and City Commissioner Jen Ahern-Koch suggested there be priorities be set up ahead of time for the type of business that goes into the space. Mr. Chambers stated that office/professional would be the ideal target and that preference would be to have a resident utilize the retail office space.
 - Suggestion was made to have Electric Vehicle (EV) charging stations in the garage.

X. NEW BUSINESS

- A. Comments for City on Downtown Density Bonus Proposal – Mr. Russell provided a background of the reasoning behind this item and that he’s looking for the Board to provide direction for him to go before the City with the Housing Authority’s proposal.
- Mr. Russell went on to outline the bonus structures he’s proposing to provide incentive to developers to build affordable housing, as well as what should be considered “affordable.” City Commissioner Jen Ahern-Koch reported that there’s an Affordable Housing Presentation online for the public to view, that this board may find helpful. She also mentioned that she could provide the presentation she did on inclusionary zoning on November 8th that may assist this board in understanding how a developer can still be profitable and still build affordable housing.
 - Following discussion, it was decided to hold a special board meeting (or utilize the upcoming Development Committee meeting) to discuss this further.

XI. PROGRAM UPDATES – ACCEPTED BY CONSENT

- A. Monthly Financial Statements
- B. Board Committee Reports
- C. Housing Management Reports
- D. Housing Voucher Report
- E. Capital Fund Program Report
- F. Resident Services Monthly Report

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- Commissioner Finger made a motion to accept the Program Updates Consent Agenda. Commissioner Colón seconded the motion.
 - The motion was voted on and passed unanimously.

XII. COMMISSIONER ANNOUNCEMENTS / COMMENTS

- A. Commissioner Sargent reported that the Resident Council added another member to the Resident Council Board, Carolyn Spencer, from the Courts/Bertha Mitchell property. She added that she wasn’t in on the election. Mr. Russell added that Joe Wigley was elected as the rep for the Annex. Commissioner Sargent also inquired about a resident who is applying and hasn’t received confirmation of her application to Amaryllis, and they pushed her application off this list. Mr. Russell said to provide him with the specifics and he’ll look up the case to provide her the information.
- B. City Commissioner Jen Ahern-Koch reported that the Coalition of City Neighborhood Associations has invited an expert speaker to their event on Inclusionary Zoning this Saturday at 9 a.m. in the back of the Municipal Auditorium.

XIII. ADJOURNMENT

The Sarasota Housing Authority Board of Commissioners meeting was adjourned at 6:27 pm.



Sarasota Housing Authority
269 South Osprey Avenue
Sarasota, Florida 34236

Special Board Meeting
April 19, 2023
3:30 P.M.

I. **CALL TO ORDER:** Vice Chair Ernestine Taylor called the meeting of the Sarasota Housing Authority Board of Commissioners to order at 3:37 pm.

II. **INVOCATION**

III. **PLEDGE OF ALLEGIANCE**

IV. **ROLL CALL**

Commissioners Present: Chair Jack Meredith (Zoom/In Person at 3:49 pm), Vice Chair Ernestine Taylor, Commissioner John Colón (Zoom), Commissioner Deborah Sargent (Zoom), Commissioner Carolyn Mason, Commissioner Mark Vengroff and Commissioner Duane Finger

Commissioners Not Present: None

Attendees: Joe Chambers and Jane Dixon (Tag Associates, Inc.)

SHA Personnel: William Russell, Rick Toney and Andrea Keddell

V. **RESOLUTIONS**

A. Res 23-06: Approval of Lofts on Lemon II & Amaryllis Park Place III FHFC RFA Applications

Vice Chair Taylor introduced Resolution 23-06 for discussion:

- Mr. Russell provided the background for the resolution and provided clarification on the type of tax credits SHA is applying for. Lofts on Lemon II would be a 4% Bond Deal with GAP funding and Amaryllis III, if it were to be funded, would be 4% Tax Credit deal. Only one is able to be funded. So, if SHA has a choice between the 2, Amaryllis would most likely be withdrawn since the Lofts on Lemon project has ARPA funds attached to it and the funds have a deadline for use. The funds being offered are storm related and, due to Hurricane Ian, Sarasota has fallen under the Tier 1 designation for funding.
- Commissioner Sargent inquired if the developer, Fortis, was different from the other projects and why this is the 1st the board has heard of this RFA. Mr. Russell explained that Fortis the same developers as the previous projects and that Fortis is a joint venture between Smith & Henzy and Calston Advisors (which is Joe Chambers' company). Mr. Russell further explained that the RFA is a one-time opportunity to fund one of our projects and that came into effect approximately 45 days ago. The developers had to evaluate and workshop the requirements to see if one or more of our projects were eligible. Once an application was deemed feasible, it was brought to the board. This is the reason for the tight timeframe to submit the applications, given the May 5th due date.

- Commissioner Sargent further inquired if a representative of the management company could come to a board meeting to explain this in person. Mr. Russell responded that Joe Chambers is present and is a representative of the Fortis company and introduced Jane Dixon, of Tag Associates, Inc., who is a former employee of Florida Housing Finance Corp and a development consultant.
- Ms. Dixon re-explained that the Legislature just recently put out these funds as a response to Hurricane Ian that hit Florida this past year. The RFA was put out fast (30-40 days) and developers have been scrambling to workshop the requirements to see if their projects are the right fit to apply for the funds. Everyone that is applying for this RFA is under a tight deadline due to the May 5th deadline. Normally developers are given up to a year to put in an application for funding.
- Commissioner Sargent inquired why this couldn't have been done at an April Board Meeting at the end of the month. Commissioner Meredith explained that SHA hadn't planned to hold an April Board meeting because Mr. Russell was going to be traveling the week of the regularly scheduled meeting. However, when this application was brought to the Board's attention, it was decided that a Board meeting needed to be held after all to give the board the information necessary to provide approval of the RFA, so this Special Board meeting was scheduled.
- Commissioner Finger inquired about how much funding this application could provide one of our projects and was told that, if awarded, it would bring in approximately \$9 million to help fund one of our projects.
- Additional discussion took place amongst the commissioners in favor of applying for this special funding opportunity.
- Commissioner Vengroff made a motion to accept Resolutions 23-06. Commissioner Finger seconded the motion.
 - The motion was voted on and passed 6 to 1 (Commissioner Sargent Opposed).

VI. ADJOURNMENT

The Sarasota Housing Authority Board of Commissioners meeting was adjourned at 3:57 pm.



TEAM MEMBER of the QUARTER

Viktoriya Coblentz – Property Manager

2nd Quarter – 2023 (Awarded June 28, 2023)

Viktoriya Coblentz is being honored as the Team Member of the Quarter due her to success to date in managing the various aspects of the McCown Towers renovation project.

Viktoriya has:

- completed the first phase of LIHTC file certification for 25% of the building. This is very significant, as these are SHA's first LIHTC managed units ever;
- successfully moved out and then moved in 25 households for the first completed renovation phase of the building and maintained compliance with all HUD programs;
- made herself available to help her co-workers as they also work through these challenges;
- accepted the changes within her department with a positive attitude and makes the effort to strive to be the best every day; and
- she has a genuine concern for her tenants and the agency and demonstrates her dedication to the tenants and agency daily.

Viktoriya is a valuable member of our team, and we congratulate her on this honor.

RESOLUTION 23-07

RESOLUTION APPROVING AMENDMENT TO SARASOTA HOUSING AUTHORITY'S (SHA) ADMISSIONS AND CONTINUED OCCUPANCY POLICY (ACOP)

WHEREAS HUD requires SHA to administer an ACOP under the guidelines that detail the local governing policies for the Public Housing Program consistent with HUD rules and regulatory requirements, as amended;

WHEREAS the ACOP defines policies for the operation for the Public Housing Program. If there is any conflict between this policy and laws or regulations from HUD the laws and regulations will prevail;

WHEREAS the attached SHA ACOP complies with the current HUD rules and regulations implementing the above reference public law; and

WHEREAS SHA Staff recommends that the revised ACOP be adopted as final policy.

NOW THEREFORE, BE IT RESOLVED THAT:

The SHA Board of Commissioners adopts the attached SHA ACOP Amendment and resolves that it become effective immediately.

ACCEPTED BY: _____ DATE: _____
Jack Meredith,
Chairman

ATTESTED BY: _____ DATE: _____
William O. Russell III,
President & CEO

PAGE 7: (HUD Required Revision/Addition)

8.2 ELIGIBILITY CRITERIA

A. A.—Family Status - All families must have a Head of Household or Co-Heads of Household. Family includes, but is not limited to, the following, regardless of actual or perceived sexual orientation, gender identity, or marital status:

1. 1.—A **family with or without children**. Such a family is defined as a group of people related by blood, marriage, adoption or affinity (regardless of actual or perceived sexual orientation, gender identity, or marital status) that live together in a stable family relationship.

2. 2) A group of persons residing together, and such group includes, but is not limited to: a) A family with or without children (a child who is temporarily away from the home because of placement in foster care is considered a member of the family).

- a. Children temporarily absent from the home due to placement in foster care are considered family members.
- b. Unborn children and children in the process of being adopted are considered family members for the purpose of determining bedroom size but are not considered family members for determining income limit.

PAGE 8: (HUD Required Revision/Addition)

4. A **disabled family**, which is:

- a. A family whose head (including co-head), spouse, or sole member is a person with disabilities.
- b. Two or more persons with disabilities living together; or
- c. One or more persons with disabilities living with one or more live-in aides.
- d. For purposes of qualifying for low-income housing, does not include a person whose disability is based solely on any drug or alcohol dependence.

e. .i) A “person with disabilities” means a person who: (1) Has a disability as defined in 42 U.S.C. § 423(d)(1);

f. 2) Has a physical, mental or emotional impairment that is expected to be of long-continued and indefinite duration, substantially impedes his or her ability to live independently, and is of such a nature that ability to live independently could be improved by more suitable housing conditions; or

g. (3) Has a developmental disability as defined in 42 U.S.C. § 15002(8) (formerly codified in 42 U.S.C. § 6001).

h.

i. ii) Important considerations: (1) The meaning of “a person with disabilities” does not exclude persons who have the disease of acquired immunodeficiency syndrome (AIDS) or any conditions arising from the virus that causes AIDS.

j.

k. (2) The meaning of “a person with disabilities” does not include a person whose disability is based solely on a dependency to any drug or alcohol (for eligibility purposes).

d-1. (3) A person who qualifies as a “person with disabilities” also qualifies as an individual with disabilities for purposes of protections under Section 504 of the Rehabilitation Act, the Americans with Disabilities Act, and the Fair Housing Act, including reasonable accommodation and program accessibility for persons with disabilities.

PAGE 10: (HUD Required Revision/Addition)

8.2 ELIGIBILITY CRITERIA

3. Delay, Denial, Reduction or Termination of Assistance of Mixed Families.

The PHA must not delay, deny, reduce or terminate assistance to an applicant or participant based on ineligible immigration status of a family member if any of the following circumstances apply:

1. At least one person in the household is a US citizen or an eligible noncitizen who has been verified by CIS.
 2. The family has submitted the required documents to the PHA timely, but the primary and secondary verification processes have not been completed.
 3. The family member from whom required documents have not been submitted to the PHA has moved out.
 4. The family member who is determined not to be in an eligible immigration status following the CIS verification has moved out.
 5. The CIS appeals process has not been completed.
 6. Assistance is prorated in accordance with the types of preservation assistance available to mixed families
 7. Assistance is prorated, and the family is not receiving assistance for the family member(s) whose eligible immigration status has not been verified.
 8. A deferral of termination of assistance has been granted or
 9. For a program participant, the informal hearing process is not complete.
-

PAGE 15: (HUD Required Revision/Addition)

8.4 *GROUNDS FOR DENIAL*

- J. A household member has been evicted from federally assisted housing within the last three years for drug-related criminal activity. ~~Were evicted from federally assisted housing within the past five years because of drug-related criminal activity.~~ The ~~five~~three-year limit is based on the date of such eviction, not the date the crime was committed.

PAGE 17: (HUD Required Revision/Addition)

8.4 *GROUNDS FOR DENIAL*

The term "admission" includes and applies to a person seeking to become a new member of an already-existing household. For example, PHAs must prohibit a person subject to a lifetime sex offender registration requirement from becoming a new member of an already-existing household (e.g., being added to an already-existing lease). Such addition to the existing household would constitute a new "admission" for the added individual.

13.0 DETERMINATION OF TOTAL TENANT PAYMENT AND TENANT RENT

13.1 FAMILY CHOICE

At admission and each year in preparation for their annual reexamination, each family is given the choice of having their rent determined under the income method or having their rent set at the flat rent amount.

- C. Families have only one choice per year except for financial hardship cases. In order for families to make informed choices about their rent options, the Sarasota will provide them with the following information whenever they have to make rent decisions:
1. The Sarasota Housing Authority's policies on switching types of rent in case of a financial hardship; and
 2. The dollar amount of tenant rent for the family under each option. If the family chose a flat rent for the previous year, the Sarasota Housing Authority will provide the amount of income-based rent for the subsequent year only the year the Sarasota Housing Authority conducts an income reexamination or if the family specifically requests it and submits updated income information.
 3. Non-Public Housing Over Income (NPHOI) families must pay the alternative rent when they've exceeded the grace period and are allowed by PHA policy the option of remaining in a public housing unit. During the 24 consecutive month grace period and in the 6 months before termination the family will continue to pay their current rent choice amount (i.e. the family's choice of income-base or flat rent, or the prorated rent for mixed families).

13.2 THE INCOME METHOD

The total tenant payment is equal to the highest of:

- A. 10% of the family's monthly income;
- B. 30% of the family's adjusted monthly income; or
- C. If the family is receiving payments for welfare assistance from a public agency and a part of those payments, adjusted in accordance with the family's actual housing costs, is specifically designated by such agency to meet the family's housing costs, the portion of those payments which is so designated. If the family's welfare assistance is ratably reduced from the standard of need by applying a percentage, the amount calculated under this provision is the amount resulting from one application of the percentage; or
- D. The minimum rent of \$50 or the NPHOI rent.

As for flat rent phase-ins, previous regulations in PIH Notice 2022-14-3342 and the subsequent FAQ's, HUD provided flexibility to PHAs to phase in all flat rent increases over a three-year period, including those increases that were 35 percent or less.

PAGE 54: (HUD Required Revision/Addition)

When the mixed family's TTP is greater than the maximum rent, the Sarasota Housing Authority will use the TTP as the mixed family TTP.

Over Income for Mixed families:

Once a mixed family has exceeded the over-income limit for 24 consecutive months, the family will either have their tenancy terminated or they must pay the alternative rent as an NPHOI family. For a PHA with a termination policy for over-income families, mixed families will pay their current, prorated rent amount during the 6-month period before termination. If the mixed family is permitted to pay the alternative rent then, pursuant to 24 CFR 5.520(d)(1), the mixed family must not receive prorated assistance. Instead, the family must pay the full alternative rent amount.

PAGE 56/57: (HUD Required Revision/Addition)

14.0 COMMUNITY SERVICE AND SELF-SUFFICIENCY REQUIREMENT

F. Members of a NPHOI family do not have to comply with the Community Services Activities or Self-Sufficiency Work Activities.

PAGE 64/65: (HUD Required Revision/Addition) *BOARD DECISION REQUIRED.

15.10 OVER-INCOME FAMILIES

Beginning March 24, 2019, the Sarasota Housing Authority shall track all public housing residents who have an adjusted income over 120% of the Area Median Income (AMI). This is defined by HUD as 2.4 times the HUD determined Very Low-Income limit for Housing Authority's jurisdiction. The limit will be adjusted each year within 60 days after HUD published new income limits. When the Housing Authority becomes aware, through an annual reexamination or an interim reexamination for an increase in income, that a family's adjusted income exceeds the applicable income limit, the Housing Authority must, per HUD regulation, document in the family's tenant file that the family exceeds the threshold to compare with the family's income a year later.

If, one year after the initial determination by the Housing Authority that a family's adjusted income exceeds the over-income limit, and the family's adjusted income continues to exceed the over-income limit, the Housing Authority must, as required by HUD regulation, provide written notification to the family that their income has exceeded the over-income limit for one year. The written notification shall further state that if the family's adjusted income continues to exceed the over-income limit for the next 12 consecutive months, the family will be subject to termination. Termination of tenancy of such a family in public housing will take place not later than 6 months after the final notice per 24 CFR 960.507(c)(3) confirming that the family has been over income for 24 consecutive months.

All notices and communications will be provided in a manner appropriate for persons with hearing, visual or other disabilities.

If the Sarasota Housing Authority discovers through an annual or interim exam that the family's adjusted income falls below the over-income limit, the two-year period starts over again if the family exceeds the limit in the future.

The Housing Authority will follow the requirement to submit an annual report on the number of over-income families and the number of families on the public housing waiting lists when HUD makes the requirement effective through a separate PIH notice.

20.2 TERMINATION BY THE HOUSING AUTHORITY

Assistance of Mixed Families must be denied or terminated when:

- A. The family has not submitted the declaration of citizenship or eligible immigration status and appropriate documentation by the specified deadline or any extension;
- B. The family has submitted the required documentation, but CIS primary and secondary verification do not verify eligible immigration status and the family does not pursue CIS appeal or informal hearing rights but the decision(s) are rendered against the family; or
- C. The PHA determines that a family has knowingly permitted an ineligible person to live in the assisted unit on a permanent basis. In this case, the PHA must terminate assistance for the entire family for at least 24 months. This does not apply if the ineligible individual at issue was considered in calculating any proration of assistance provided for the family.

Notification of denial due to Citizenship Status

When a PHA denies or terminates assistance due to a lack of citizenship or eligible immigration status, the PHA must send a written notice to the household which includes the following:

- A. A statement that financial assistance will be denied or terminated and the justification;
- B. Notification that the family may be eligible for prorated assistance;
- C. In the case of a tenant, the criteria and procedures for preserving assistance;
- D. The right to appeal the results of the secondary verification to the CIS and the procedures to appeal and;
- E. The right to request an informal hearing from the PHA in lieu of or after a CIS appeal.

In the case of applicants, the notice must advise that the assistance may be provided until the conclusion of the CIS appeal process, however, assistance may be placed on hold until the end of the informal hearing process.

RESOLUTION 23-08

**RESOLUTION APPROVING SARASOTA HOUSING AUTHORITY
HOUSING CHOICE VOUCHER ADMINISTRATION PLAN**

WHEREAS HUD requires Sarasota Housing Authority (SHA) to administer its housing choice voucher program under the guidelines of a Section 8 Administrative Plan (PLAN) that details the local governing policies consistent with HUD rules and regulations, as amended;

WHEREAS HUD advises Public Housing Authorities (PHAs) to take administrative steps to amend and update the PLAN as needed;

WHEREAS SHA Staff recommends that PLAN be revised; and

WHEREAS the attached PLAN does comply with the current HUD rules and regulations, as well as Florida real estate laws.

NOW, THEREFORE, BE IT RESOLVED THAT:

The SHA Board of Commissioners approves the attached revised PLAN and authorizes SHA to immediately begin using the revised PLAN and its attachments.

ACCEPTED BY: _____ DATE: _____
Jack Meredith,
Chairman

ATTESTED BY: _____ DATE: _____
William O. Russell III,
President & CEO

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Chapter 4

PART II: MANAGING THE WAITING LIST

4-II.A. OVERVIEW

The PHA must have policies regarding various aspects of organizing and managing the waiting list of applicant families. This includes opening the list to new applicants, closing the list to new applicants, notifying the public of waiting list openings and closings, updating waiting list information, purging the list of families that are no longer interested in or eligible for assistance, as well as conducting outreach to ensure a sufficient number of applicants.

In addition, HUD imposes requirements on how a PHA may structure its waiting list and how families must be treated if they apply for assistance from a PHA that administers more than one assisted housing program.

4-II.B. ORGANIZATION OF THE WAITING LIST [24 CFR 982.204 and 205]

The PHA's HCV waiting list must be organized in such a manner to allow the PHA to accurately identify and select families for assistance in the proper order, according to the admissions policies described in this plan.

The waiting list must contain the following information for each applicant listed:

- Applicant name.
- Family unit size.
- Date and time of application.
- Qualification for any local preference.
- Racial or ethnic designation of the head of household.

HUD requires the PHA to maintain a single waiting list for the HCV program unless it serves more than one county or municipality. Such PHAs are permitted, but not required, to maintain a separate waiting list for each county or municipality served.

SHA Policy

The PHA will maintain a single waiting list for the regular HCV program.

The PHA reserves the right to provide ~~public housing~~SHA residents top priority when HUD approves a demolition/disposition/conversion application for public housing properties as part of relocation efforts. In addition, the PHA reserves the right to provide top priority to SHA and/or SHFC residents whom the agency determines must be relocated from their current residence due to a determination made by SHA/SHFC and through no fault of the resident.

HUD directs that a family that applies for assistance from the HCV program must be offered the opportunity to be placed on the waiting list for any public housing, project-based voucher or moderate rehabilitation program the PHA operates if, 1) the other programs' waiting lists are open, and 2) the family is qualified for the other programs.

HUD permits, but does not require, that PHAs maintain a single merged waiting list for their public housing, Section 8, and other subsidized housing programs.

Chapter 5 - BRIEFINGS AND VOUCHER ISSUANCE

5-II.E. VOUCHER TERM, EXTENSIONS, AND SUSPENSIONS

Extensions of Voucher Term [24 CFR 982.303(b)]

The PHA has the authority to grant extensions of search time, to specify the length of an extension, and to determine the circumstances under which extensions will be granted. There is no limit on the number of extensions that the PHA can approve. Discretionary policies related to extension and expiration of search time must be described in the PHA's administrative plan [24 CFR 982.54].

PHAs must approve additional search time if needed as a reasonable accommodation to make the program accessible to and usable by a person with disabilities. The extension period must be reasonable for the purpose.

The family must be notified in writing of the PHA's decision to approve or deny an extension. The PHA's decision to deny a request for an extension of the voucher term is not subject to informal review [24 CFR 982.554(c)(4)].

PHA Policy

The PHA will approve extensions only in the following circumstances:

It is necessary as a reasonable accommodation for a person with disabilities.

It is necessary due to reasons beyond the family's control, as determined by the PHA. Following is a list of extenuating circumstances that the PHA may consider in making its decision. The presence of these circumstances does not guarantee that an extension will be granted:

Hospitalization of a family member during the voucher term that prevented the family from seeking housing

Family whose voucher is *greater than* a 4 BR and they are experiencing difficulty in finding a unit of appropriate size

If the family has already submitted at least three requests for tenancy approval that were not approved by the PHA

If the family requires a handicap accessible unit

Any request for an additional extension must include the reason(s) an additional extension is necessary. The PHA may require the family to provide documentation to support the request.

All requests for extensions to the voucher term must be made in writing and submitted to the PHA prior to the expiration date of the voucher (or extended term of the voucher).

The PHA will decide whether to approve or deny an extension request within 10 calendar days of the date the request is received and will immediately provide the family written notice of its decision.

Generally, the PHA will not approve any vouchers beyond 120 days from the date of issuance. However, the CEO may approve additional extensions if there are circumstances beyond the participant's control that have impeded a successful lease-up.

Chapter 15 - SPECIAL HOUSING TYPES

PART VII: HOMEOWNERSHIP

15-VII.H. FINANCING [24 CFR 982.632]

The PHA may establish requirements for financing purchase of a home under the homeownership option. This may include requirements concerning qualification of lenders, terms of financing, restrictions concerning debt secured by the home, lender qualifications, loan terms, and affordability of the debt. The PHA must establish policies describing these requirements in the administrative plan.

A PHA may not require that families acquire financing from one or more specified lenders, thereby restricting the family's ability to secure favorable financing terms.

SHA Policy

As a check against predatory lending, the SHA will review the financing and refinancing of each purchase transaction, including estimated closing costs. The SHA will not approve loans for features such as balloon payments, adjustable-rate mortgages and unusually high interest rates. The SHA will not approve "seller financing" or "owner held" mortgages. Beyond these basic criteria, the SHA will rely on lenders or the secondary market to determine the loan that will be affordable to program participants.

The SHA will not require the family to have more than the minimum of 1% of their money in the transaction. However, in cases where a lender is requiring a larger amount, the family must be held to the underwriting guidelines set by their lending institution.

The SHA will approve a family's request to utilize its Family Self Sufficiency escrow account for down payment and/or closing costs when purchasing a unit under the HCV homeownership option.

Loan Restrictions

Mortgages with balloon payments, interest only, or variable interest rates are not allowed under SHA's program. The buyer may not enter into a seller financing or lease-purchase agreement under this program. SHA reserves the right to review lender qualifications and the loan terms before authorizing homeownership assistance. SHA may disapprove proposed financing of the debt if SHA determines that the debt is unaffordable. In making this determination, SHA will take into account family expenses such as child care, un-reimbursed medical expenses, homeownership expenses, and other family expenses, in addition to the participant's income.

Independent of the lender's requirements, SHA has established a criteria that the family cannot have a family share in excess of 45% of the monthly adjusted income at the time of the initial closing.

SHA must approve any proposed refinancing of the property. The Homeownership Manager and HCV Director will review all requests for refinancing.

- Refinancing the property, without prior written approval from SHA, may result in termination of the HCV Homeownership assistance.

In making its determination, SHA will take into account the reason(s) for the request to refinance, as well as the current assets and liabilities of the family, and how the refinancing will impact the total tenant payment. Homeownership assistance may continue if refinancing is approved, but will be limited to the remaining term based on the initial mortgage loan.

Chapter 16 - PROGRAM ADMINISTRATION

PART IX: VIOLENCE AGAINST WOMEN ACT (VAWA) (REPLACES WHOLE SECTION)

16-IX.A. PURPOSE AND APPLICABILITY

The purpose of this policy is to implement the requirements of the Violence Against Women Act (VAWA) with respect to the responsibilities of the PHA regarding domestic violence, dating violence, sexual assault, and stalking. This policy shall be applicable to all of the federally subsidized housing programs administered by the PHA and shall be part of the Public Housing Admissions and Continued Occupancy Policy (ACOP) by reference. Protections under this policy are available to all victims regardless of sex, gender identity, or sexual orientation and will be applied consistently with all nondiscrimination and fair housing requirements.

16-IX.B. GOALS AND OBJECTIVES

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

16-IX.C. DEFINITIONS

A. **DOMESTIC VIOLENCE.** —The term ‘domestic violence’ includes felony or misdemeanor crimes committed by a current or former spouse or intimate partner of the victim under the family or domestic violence laws of the jurisdiction receiving grant funding and, in the case of victim services, includes the use or attempted use of physical abuse or sexual abuse, or a pattern of any other coercive behavior committed, enabled, or solicited to gain or maintain power and control over a victim, including verbal, psychological, economic, or technological abuse that may or may not constitute criminal behavior, by a person who:

- (1) is a current or former spouse or intimate partner of the victim, or person similarly situated to a spouse of the victim;
- (2) is cohabitating, or has cohabitated, with the victim as a spouse or intimate partner;
- (3) shares a child in common with the victim; or
- (4) commits acts against a youth or adult victim who is protected from those acts under the family or domestic violence laws of the jurisdiction

- B. Spouse or Intimate Partner - includes a person who is or has been in a social relationship of a romantic or intimate nature with the victim, as determined by the length of the relationship, the type of the relationship, and the frequency of interaction between the persons involved in the relationship.
- C. Dating Violence - violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim and where the existence of such a relationship is determined by the length of the relationship, the type of the relationship, and the frequency of interaction between the persons involved in the relationship.
- D. Sexual Assault - is any type of sexual contact or behavior that occurs without the explicit consent of the recipient, including when the individual lacks capacity to consent
- E. Stalking - engaging in a course of conduct directed at a specific person that would cause a reasonable person to fear for the person's individual safety or the safety of others, or suffer substantial emotional distress
- F. Affiliated individual - with respect to an individual, means
- (1) a spouse, parent, brother, sister, or child of that individual, or a person to whom that individual stands in the place of a parent or guardian (for example, the affiliated individual is a person in the care, custody, or control of that individual); or
 - (2) any other person living in the household of that individual
- G. Perpetrator - a person who commits acts of domestic violence, dating violence, sexual assault, or stalking against a victim
- H. VAWA Self Petitioner - refers to noncitizens who claim to be victims of “battery or extreme cruelty.” Battery or extreme cruelty includes domestic violence, dating violence, sexual assault, and stalking. VAWA allows these noncitizens to self-petition for Lawful Permanent Resident (LPR) status without the cooperation of or knowledge of their abusive relative.
- I. ECONOMIC ABUSE.—The term ‘economic abuse’, in the context of domestic violence, dating violence, and abuse in later life, means behavior that is coercive, deceptive, or unreasonably controls or restrains a person’s ability to acquire, use, or maintain economic resources to which they are entitled, including using coercion, fraud, or manipulation to:
- (1) restrict a person’s access to money, assets, credit, or financial information;
 - (2) unfairly use a person’s personal economic resources, including money, assets, and credit, for one’s own advantage; or
 - (3) exert undue influence over a person’s financial and economic behavior or decisions, including forcing default on joint or other financial obligations, exploiting powers of attorney, guardianship, or conservatorship, or failing or neglecting to act in the best interests of a person to whom one has a fiduciary duty.

- J. **TECHNOLOGICAL ABUSE**—The term ‘technological abuse’ means an act or pattern of behavior that occurs within domestic violence, sexual assault, dating violence or stalking and is intended to harm, threaten, intimidate, control, stalk, harass, impersonate, exploit, extort, or monitor, except as otherwise permitted by law, another person, that occurs using any form of technology, including but not limited to: internet enabled devices, online spaces and platforms, computers, mobile devices, cameras and imaging programs, apps, location tracking devices, or communication technologies, or any other emerging technologies.

16-IX.D. NOTIFICATIONS PROVIDED

- A. All applicants and tenants of all PHA Housing Programs will be provided HUD-5380, "Notification of Occupancy Rights Under the Violence Against Women Act (VAWA)" and HUD-5382, "Certification of Domestic Violence.
- B. Dating violence, Sexual Assault, or Stalking and Alternate Documents" at the following times:
- (1) at time of denial of assistance or admission
 - (2) at time of providing of assistance or admission
 - (3) at any eviction or termination
 - (4) at recertification or lease renewal
- C. These forms will be provided in the applicable language, if necessary, in accordance with Executive Order 13166 (Improving Access to Services for Persons with Limited English Proficiency).

16-IX.E. ADMISSIONS AND SCREENING

- A. Non-Denial of Assistance - The PHA will not deny assistance or admission to any person because that person is or has been a victim of domestic violence, dating violence, sexual assault, or stalking, provided that such person is otherwise qualified for admission.
- B. Mitigation of Disqualifying Information
- (1) An applicant for assistance whose history includes incidents in which the applicant was a victim of domestic violence, may request that the PHA take such information into account in mitigation of potentially disqualifying information, such as poor credit history or previous damage to a dwelling.
 - (2) If requested by an applicant to take such mitigating information into account, the PHA shall be entitled to conduct such inquiries as are reasonably necessary to verify the claimed history of domestic violence and its probable relevance to the potentially disqualifying information.
 - (3) The PHA will not disregard or mitigate potentially disqualifying information if the applicant household includes a perpetrator of a previous incident or incidents of domestic violence.

16-IX.F. TERMINATION OF TENANCY OR ASSISTANCE

A. VAWA Protections

- (1) A tenant may not be denied tenancy or occupancy rights solely on the basis of criminal activity directly relating to domestic violence, dating violence, sexual assault, or stalking if
 - a. the criminal activity is engaged in by a member of the household of the tenant or any guest or other person under the control of the tenant and
 - b. the tenant or an affiliated individual of the tenant is the victim or threatened victim of such domestic violence, dating violence, sexual assault, or stalking.
- (2) An incident of actual or threatened domestic violence, dating violence, sexual assault, or stalking shall not be considered as a serious or repeated violation of the lease by the victim or threatened victim or good cause for terminating the assistance, tenancy or occupancy rights of the victim or threatened victim of such incident.

B. Limitations of VAWA Protections

- (1) Nothing in the above section limits the authority of the PHA to comply with a court order with respect to the rights of access or control of property, including civil protection orders issued to protect a victim of domestic violence, dating violence, sexual assault, or stalking, or the distribution or possession of property among members of a household.
- (2) Nothing in the above section limits any available authority of the PHA to evict or terminate assistance to a tenant for any violation not premised on an act of domestic violence, dating violence, sexual assault, or stalking. However, the PHA will not hold to a more demanding standard, a tenant or an affiliated individual who is or has been a victim of or domestic violence, dating violence, sexual assault, or stalking.
- (3) Nothing in the above section limits the authority of the PHA to evict or terminate from assistance any tenant or lawful applicant if
 - a. PHA can demonstrate an actual and imminent threat to other tenants or to those employed at or providing service to the property, if the tenant is not evicted or terminated from the assistance, and
 - b. no other actions that could be taken to reduce the threat have been successful, including transferring the victim to a different unit, barring the perpetrator from the property, involving law enforcement, or seeking other legal remedies to prevent the perpetrator from acting on a threat.

16-IX.G. VERIFICATION OF DOMESTIC VIOLENCE, DATING VIOLENCE, SEXUAL ASSAULT, OR STALKING

A. Requirement for Verification. Subject only to waiver as provided in paragraph D below, the PHA shall require verification in all cases where an individual requests protection against an action involving domestic violence, dating violence, sexual assault, or stalking. Verification may be accomplished in one of three ways:

- (1) Completing HUD-5382, "Certification of Domestic Violence, Dating Violence, Sexual Assault, or Stalking"
 - (2) Other documentation signed by an employee, agent, or volunteer of a victim service provider, an attorney, or a medical professional, from whom the victim has sought assistance in addressing domestic violence, dating violence, sexual assault, or stalking, or the side effects of the abuse, described in such documentation. The professional providing the documentation must sign and attest under penalty of perjury that the incident or incidents in question are bona fide and meet the requirements of the applicable definition set forth in this policy.
 - (3) Police or court record - provided to the PHA by federal, state, tribal, or local police or court record describing the incident or incidents in question.
- B. Time Allowed. An individual who claims protection against adverse action based on an incident or incidents of actual or threatened domestic violence, dating violence, sexual assault or stalking, and who is requested by the PHA to provide verification, must provide such verification within 14 business days after receipt of the request for verification. Failure to provide verification, in proper form within such time will result in loss of protection under VAWA and this policy against a proposed adverse action.
- C. If the PHA receives conflicting evidence that an incident of domestic violence, dating violence, sexual assault, or stalking has been committed (such as certification forms from two or more members of a household each claiming to be a victim and naming one or more of the other petitioning household members as the abuser or perpetrator), the PHA has the right to request that the tenant provide third-party documentation within thirty 30 calendar days in order to resolve the conflict. Failure to provide third-party documentation where there is conflicting evidence will result in loss of protection under VAWA and this policy against a proposed adverse action.
- D. Waiver of verification requirement. With respect to any specific case, the PHA may waive the above-stated requirements for verification and provide the benefits of this policy based on the victim's statement or other corroborating evidence. Such waiver may be granted in the sole discretion of the Executive Director or President/CEO. Any such waiver must be in writing. Waiver in a particular instance or instances shall not operate as precedent for, or create any right to, waiver in any other case or cases, regardless of similarity in circumstances.

16-IX.H. NON-CITIZEN SELF-PETITIONER VERIFICATION

- A. Financial assistance to ineligible noncitizens will not be denied while verifying immigration status.
- B. Self-petitioners can indicate that they are in "satisfactory immigration status" when applying for assistance or continued assistance. "Satisfactory immigration status" means an immigration status which does not make the individual ineligible for financial assistance. After verifying such immigration status in the Department of Homeland Security (DHS) Systematic Alien Verification for Entitlements (SAVE) System, PHAs will make a final determination as to the self-petitioner's eligibility for assistance.

- C. In order to qualify, the noncitizen victim must have been battered or subjected to extreme cruelty by their spouse or parent, who is a U.S. citizen or LPR (Lawfully Permanent Resident).
- D. Once a PHA receives a self-petition (INS Form I-360 or I-130) or INS Form 797, PHA will not request any additional information from the VAWA self-petitioner, other than what is required using the SAVE system to complete the verification.
- E. When a PHA receives a self-petition or INS Form 797 Notice of Action, the PHA will initiate verification in the SAVE System
- F. Final determination from the SAVE System. PHA will receive one of two confirmations:
- (1) the VAWA self-petition is verified, in which case the applicant is immediately eligible for housing and no evidence of battery or extreme cruelty shall be requested or collected;
 - (2) the I-130 is verified, in which case the petitioner submitting a family-based visa petition must provide to the PHA any evidence of “battery or extreme cruelty.”
- G. Housing assistance and all other VAWA protections will be granted to the self-petitioner throughout the verification process until a final determination of LPR (Lawful Permanent Resident) status is made. If the final determination is to deny the VAWA self-petition or LPR petition, the PHA must alert the petitioner and take actions to terminate voucher assistance or evict the petitioner from public housing in accordance with the existing public housing requirements.

16-IX.I. EMERGENCY TRANSFER PLAN

A. Eligibility for Transfer

In accordance with the Violence Against Women Act (VAWA) the PHA allows tenants who are victims of domestic violence, dating violence, sexual assault, or stalking to request an emergency transfer from the tenant’s current unit to another unit, regardless of sex, gender identity, or sexual orientation. The ability of the PHA to honor such request for tenants currently receiving assistance may depend upon:

- (1) a preliminary determination that the tenant is or has been a victim of domestic violence, dating violence, sexual assault, or stalking, and
- (2) on whether the PHA has another dwelling unit that is available and is safe to offer the tenant for temporary or more permanent occupancy.

B. Requesting a transfer

- (1) To request an emergency, transfer the tenant shall notify the PHA office and submit a written request for a transfer (HUD-5383). The PHA will provide reasonable accommodations to this policy for individuals with disabilities. The tenant's written request for an emergency transfer should include either:

- a. A statement expressing that the tenant reasonably believes that there is a threat of imminent harm from further violence if the tenant were to remain in the same dwelling unit assisted under the PHA's program; or
 - b. A statement that the tenant was a sexual assault victim and that the sexual assault occurred on the premises during the 90-calendar-day period preceding the tenant's request for an emergency transfer.
- (2) The PHA cannot guarantee that a transfer request will be approved or how long it will take to process a transfer request. However, the PHA will act as quickly as possible to move a tenant who is a victim of domestic violence, dating violence, sexual assault, or stalking to another unit, subject to availability and safety of a unit.
 - (3) If a tenant reasonably believes a proposed transfer would not be safe, the tenant may request a transfer to a different unit.
 - (4) If a unit is available, the transferred tenant must agree to abide by the terms and conditions that govern occupancy in the unit to which the tenant has been transferred. The PHA may be unable to transfer a tenant to a particular unit if the tenant cannot establish eligibility for that unit.
 - (5) In cases where the PHA determines that the family's decision to move out of the PHA housing was reasonable under the circumstances, the PHA may wholly or partially waive rent payments and any rent owed shall be reduced by the amounts of rent collected for the remaining lease term from a tenant subsequently occupying the unit.
 - (6) Portability - An HCV-assisted tenant will not be denied portability to a unit located in another jurisdiction so long as the tenant has complied with all other requirements of the Housing Choice Voucher program and has moved from the unit in order to protect the health or safety of an individual member of the household who is or has been the victim of domestic violence, dating violence, sexual assault or stalking and who reasonably believes that the tenant or other household member will be imminently threatened by harm from further violence if the individual remains in the present dwelling unit.
 - (7) If the PHA has no safe and available units for which a tenant who needs an emergency is eligible, the PHA will assist the tenant in identifying other housing providers who may have safe and available units to which the tenant could move.
 - (8) At the tenant's request, the PHA will also assist tenants in contacting the local organizations offering assistance to victims of domestic violence, dating violence, sexual assault, or stalking that are attached to this plan.

C. Safety and Security of Tenants

- (1) Confidentiality - The PHA will keep confidential any information that the tenant submits in requesting an emergency transfer, and information about the emergency transfer, unless the tenant gives the PHA written permission to release the information on a time limited basis, or disclosure of the information is required by law or required for use in an eviction proceeding or

hearing regarding termination of assistance from the covered program. This includes keeping confidential the new location of the dwelling unit of the tenant, if one is provided, from the person(s) that committed an act(s) of domestic violence, dating violence, sexual assault, or stalking against the tenant.

(2) Pending processing of the transfer and the actual transfer, if it is approved and occurs, the tenant is urged to take all reasonable precautions to be safe.

(3) Tenants who are or have been victims of domestic violence are encouraged to contact the National Domestic Violence Hotline at 1-800-799-7233, or a local domestic violence shelter, for assistance in creating a safety plan. For persons with hearing impairments, that hotline can be accessed by calling 1-800-787-3224 (TTY).

(4) Tenants who have been victims of sexual assault may call the Rape, Abuse & Incest National Network's National Sexual Assault Hotline at 800-656-HOPE, or visit the online hotline at <https://ohl.rainn.org/online/>.

(5) Tenants who are or have been victims of stalking seeking help may visit the National Center for Victims of Crime's Stalking Resource Center at <https://www.victimsofcrime.org/our-programs/stalking-resource-center>.

16-IX.J. OTHER REMEDIES

A. Lease Bifurcation

(1) the PHA may bifurcate a lease; that is, remove a household member from a lease in order to evict, remove, terminate occupancy rights, or terminate assistance to that member who engages in criminal activity related to of domestic violence, dating violence, sexual assault, or stalking. In such a case, it does not matter that the perpetrator was a signatory to the lease and the victim is allowed to stay in the unit or on the program.

(2) In removing the perpetrator from the household, the PHA will follow all federal, state and local eviction procedures.

(3) If the evicted person was the eligible person in the household, the remaining tenants will be given 90 days from the date of bifurcation of the lease to:

- a. establish eligibility for the program they are currently under
- b. establish eligibility under another program, or
- c. find alternative housing

B. Efforts to promote housing stability

The PHA will make every effort that is feasible and permissible to assist victims to remain in their units or other units of the PHA and/or retain assistance. The PHA will bear the cost of any transfer, where permissible.

C. Relationships with service providers

It is the policy of the PHA to cooperate with organizations and entities, both private and governmental, that provide shelter and/or services to victims of domestic violence. If the PHA becomes aware that an individual assisted by the PHA is a victim of domestic violence, dating violence, sexual assault, or stalking, the PHA will refer the victim to such providers of shelter or services as appropriate. Notwithstanding the foregoing, this Policy does not create any legal obligation requiring the PHA either to maintain a relationship with any particular provider of shelter or services to victims of domestic violence or to make a referral in any particular case. The PHA's annual Public Housing Agency Plan shall describe providers of shelter or services to victims of domestic violence with which the PHA has referral or other cooperative relationships.

ATTACHMENT I

**LOCAL RESOURCES FOR VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE,
SEXUAL ASSAULT, OR STALKING**

NOTICE OF OCCUPANCY RIGHTS UNDER U.S. Department of Housing and Urban
Development
THE VIOLENCE AGAINST WOMEN ACT

OMB Approval No. 2577-0286
Expires 06/30/2017
HUD-5380

ATTACHMENT II
Sarasota Housing Authority

Notice of Occupancy Rights under the Violence Against Women Act

To all Tenants and Applicants

The Violence Against Women Act (VAWA) provides protections for victims of domestic violence, dating violence, sexual assault, or stalking. VAWA protections are not only available to women but are available equally to all individuals regardless of sex, gender identity, or sexual orientation. The U.S. Department of Housing and Urban Development (HUD) is the Federal agency that oversees that Sarasota Public Housing Program is in compliance with VAWA. This notice explains your rights under VAWA. A HUD-approved certification form is attached to this notice. You can fill out this form to show that you are or have been a victim of domestic violence, dating violence, sexual assault, or stalking, and that you wish to use your rights under VAWA.”

Protections for Applicants

If you otherwise qualify for assistance under the Sarasota Housing Program, you cannot be denied admission or denied assistance because you are or have been a victim of domestic violence, dating violence, sexual assault, or stalking.

Protections for Tenants

If you are receiving assistance under the Sarasota Public Housing Program you may not be denied assistance, terminated from participation, or be evicted from your rental housing because you are or have been a victim of domestic violence, dating violence, sexual assault, or stalking.

Also, if you or an affiliated individual of yours is or has been the victim of domestic violence, dating violence, sexual assault, or stalking by a member of your household or any guest, you may not be denied rental assistance or occupancy rights under the Sarasota Public Housing Program solely on the basis of criminal activity directly relating to that domestic violence, dating violence, sexual assault, or stalking.

Affiliated individual means your spouse, parent, brother, sister, or child, or a person to whom you stand in the place of a parent or guardian (for example, the affiliated individual is in your care, custody, or control); or any individual, tenant, or lawful occupant living in your household.

Removing the Abuser or Perpetrator from the Household

The Sarasota Housing Authority may divide (bifurcate) your lease in order to evict the individual or terminate the assistance of the individual who has engaged in criminal activity (the abuser or perpetrator) directly relating to domestic violence, dating violence, sexual assault, or stalking.

If the Sarasota Housing Authority chooses to remove the abuser or perpetrator, the Sarasota Housing Authority may not take away the rights of eligible tenants to the unit or otherwise punish the remaining tenants. If the evicted abuser or perpetrator was the sole tenant to have established eligibility for assistance under the program, Housing Authority must allow the tenant who is or has been a victim and other household members to remain in the unit for a period of time, in order to establish eligibility under the program or under another HUD housing program covered by VAWA, or, find alternative housing.

In removing the abuser or perpetrator from the household, Housing Authority must follow Federal, State, and local eviction procedures. In order to divide a lease, the Housing Authority may, but is not required to, ask you for documentation or certification of the incidences of domestic violence, dating violence, sexual assault, or stalking.

Moving to Another Unit

Upon your request, the Housing Authority may permit you to move to another unit, subject to the availability of other units, and still keep your assistance. In order to approve a request, Housing Authority may ask you to provide documentation that you are requesting to move because of an incidence of domestic violence, dating violence, sexual assault, or stalking. If the request is a request for emergency transfer, the housing provider may ask you to submit a written request or fill out a form where you certify that you meet the criteria for an emergency transfer under VAWA. The criteria are:

- (1) You are a victim of domestic violence, dating violence, sexual assault, or stalking. If your housing provider does not already have documentation that you are a victim of domestic violence, dating violence, sexual assault, or stalking, your housing provider may ask you for such documentation, as described in the documentation section below.
- (2) You expressly request the emergency transfer. Your housing provider may choose to require that you submit a form or may accept another written or oral request.
- (3) You reasonably believe you are threatened with imminent harm from further violence if you remain in your current unit. This means you have a reason to fear that if you do not receive a transfer, you would suffer violence in the very near future.

OR

You are a victim of sexual assault and the assault occurred on the premises during the 90-calendar-day period before you request a transfer. If you are a victim of sexual assault, then in addition to qualifying for an emergency transfer because you reasonably believe you are threatened with imminent harm from further violence if you remain in your unit, you may qualify for an emergency transfer if the sexual assault occurred on the premises of the property from which you are seeking your transfer, and that assault happened within the 90-calendar-day period before you expressly request the transfer.

The Housing Authority will keep confidential requests for emergency transfers by victims of domestic violence, dating violence, sexual assault, or stalking, and the location of any move by such victims and their families.

The Housing Authority's emergency transfer plan provides further information on emergency transfers, and the Housing Authority must make a copy of its emergency transfer plan available to you if you ask to see it.

Documenting You Are or Have Been a Victim of Domestic Violence, Dating Violence, Sexual Assault or Stalking.

The Housing Authority can, but is not required to, ask you to provide documentation to "certify" that you are or have been a victim of domestic violence, dating violence, sexual assault, or stalking. Such request from Housing Authority must be in writing, and the Housing Authority must give you at least 14 business days (Saturdays, Sundays, and Federal holidays do not count) from the day you receive the request to provide the documentation. The Housing Authority may, but does not have to, extend the deadline for the submission of documentation upon your request.

You can provide one of the following to the Housing Authority as documentation. It is your choice which of the following to submit if the Housing Authority asks you to provide documentation that you are or have been a victim of domestic violence, dating violence, sexual assault, or stalking.

- A complete HUD-approved certification form given to you by Housing Authority with this notice, that documents an incident of domestic violence, dating violence, sexual assault, or stalking. The form will ask for your name, the date, time, and location of the incident of domestic violence, dating violence, sexual assault, or stalking, and a description of the incident. The certification form provides for including the name of the abuser or perpetrator if the name of the abuser or perpetrator is known and is safe to provide.
- A record of a Federal, State, tribal, territorial, or local law enforcement agency, court, or administrative agency that documents the incident of domestic violence, dating violence, sexual assault, or stalking. Examples of such records include police reports, protective orders, and restraining orders, among others.
- A statement, which you must sign, along with the signature of an employee, agent, or volunteer of a victim service provider, an attorney, a medical professional or a mental health professional (collectively, “professional”) from whom you sought assistance in addressing domestic violence, dating violence, sexual assault, or stalking, or the effects of abuse, and with the professional selected by you attesting under penalty of perjury that he or she believes that the incident or incidents of domestic violence, dating violence, sexual assault, or stalking are grounds for protection.
- Any other statement or evidence that the Housing Authority has agreed to accept.

If you fail or refuse to provide one of these documents within the 14 business days, the Housing Authority does not have to provide you with the protections contained in this notice.

If the Housing Authority receives conflicting evidence that an incident of domestic violence, dating violence, sexual assault, or stalking has been committed (such as certification forms from two or more members of a household each claiming to be a victim and naming one or more of the other petitioning household members as the abuser or perpetrator), Housing Authority has the right to request that you provide third-party documentation within thirty 30 calendar days in order to resolve the conflict. If you fail or refuse to provide third-party documentation where there is conflicting evidence, the Housing Authority does not have to provide you with the protections contained in this notice.

Confidentiality

The Housing Authority must keep confidential any information you provide related to the exercise of your rights under VAWA, including the fact that you are exercising your rights under VAWA.

The Housing Authority must not allow any individual administering assistance or other services on behalf of the Housing Authority (for example, employees and contractors) to have access to confidential information unless for reasons that specifically call for these individuals to have access to this information under applicable Federal, State, or local law.

The Housing Authority must not enter your information into any shared database or disclose your information to any other entity or individual. The Housing Authority, however, may disclose the information provided if:

- You give written permission to Housing Authority to release the information on a time limited basis.
- The Housing Authority needs to use the information in an eviction or termination proceeding, such as to evict your abuser or perpetrator or terminate your abuser or perpetrator from assistance under this program.
- A law requires the Housing Authority or your landlord to release the information.

VAWA does not limit the Housing Authority's duty to honor court orders about access to or control of the property. This includes orders issued to protect a victim and orders dividing property among household members in cases where a family breaks up.

Reasons a Tenant Eligible for Occupancy Rights under VAWA May Be Evicted or Assistance May Be Terminated

You can be evicted, and your assistance can be terminated for serious or repeated lease violations that are not related to domestic violence, dating violence, sexual assault, or stalking committed against you. However, the Housing Authority cannot hold tenants who have been victims of domestic violence, dating violence, sexual assault, or stalking to a more demanding set of rules than it applies to tenants who have not been victims of domestic violence, dating violence, sexual assault, or stalking.

The protections described in this notice might not apply, and you could be evicted, and your assistance terminated, if the Housing Authority can demonstrate that not evicting you or terminating your assistance would present a real physical danger that:

- 1) Would occur within an immediate time frame, and
- 2) Could result in death or serious bodily harm to other tenants or those who work on the property.

If the Housing Authority can demonstrate the above, the Housing Authority should only terminate your assistance or evict you if there are no other actions that could be taken to reduce or eliminate the threat.

Other Laws

VAWA does not replace any Federal, State, or local law that provides greater protection for victims of domestic violence, dating violence, sexual assault, or stalking. You may be entitled to additional housing protections for victims of domestic violence, dating violence, sexual assault, or stalking under other Federal laws, as well as under State and local laws.

Non-Compliance with The Requirements of This Notice

You may report the Housing Authority's violations of these rights and seek additional assistance, if needed, by contacting or filing a complaint with [insert contact information for any intermediary, if applicable] or [insert HUD field office].

For Additional Information

You may view a copy of HUD's final VAWA rule at [insert Federal Register link].

Additionally, Housing Authority must make a copy of HUD's VAWA regulations available to you if you ask to see them.

For questions regarding VAWA, please contact [insert name of program or rental assistance contact information able to answer questions on VAWA].

For help regarding an abusive relationship, you may call the National Domestic Violence Hotline at 1-800-799-7233 or, for persons with hearing impairments, 1-800-787-3224 (TTY). You may also contact [Insert contact information for relevant local organizations].

For tenants who are or have been victims of stalking seeking help may visit the National Center for Victims of Crime's Stalking Resource Center at <https://www.victimsofcrime.org/our-programs/stalking-resource-center>.

For help regarding sexual assault, you may contact [Insert contact information for relevant organizations]

Victims of stalking seeking help may contact [Insert contact information for relevant organizations].

Attachment: Certification form HUD-5382 [form approved for this program to be included]

ATTACHMENT III

CERTIFICATION OF DOMESTIC VIOLENCE, DATING VIOLENCE, SEXUAL ASSAULT, OR STALKING, AND ALTERNATE DOCUMENTATION

U.S. Department of Housing and Urban
Development
OMB Approval No. 2577-0286
Exp. 06/30/2017
HUD-5382

Purpose of Form: The Violence Against Women Act (“VAWA”) protects applicants, tenants, and program participants in certain HUD programs from being evicted, denied housing assistance, or terminated from housing assistance based on acts of domestic violence, dating violence, sexual assault, or stalking against them. Despite the name of this law, VAWA protection is available to victims of domestic violence, dating violence, sexual assault, and stalking, regardless of sex, gender identity, or sexual orientation.

Use of This Optional Form: If you are seeking VAWA protections from your housing provider, your housing provider may give you a written request that asks you to submit documentation about the incident or incidents of domestic violence, dating violence, sexual assault, or stalking.

In response to this request, you or someone on your behalf may complete this optional form and submit it to your housing provider, or you may submit one of the following types of third-party documentation:

- (1) A document signed by you and an employee, agent, or volunteer of a victim service provider, an attorney, or medical professional, or a mental health professional (collectively, “professional”) from whom you have sought assistance relating to domestic violence, dating violence, sexual assault, or stalking, or the effects of abuse. The document must specify, under penalty of perjury, that the professional believes the incident or incidents of domestic violence, dating violence, sexual assault, or stalking occurred and meet the definition of “domestic violence,” “dating violence,” “sexual assault,” or “stalking” in HUD’s regulations at 24 CFR 5.2003.
- (2) A record of a Federal, State, tribal, territorial or local law enforcement agency, court, or administrative agency; or
- (3) At the discretion of the housing provider, a statement or other evidence provided by the applicant or tenant.

Submission of Documentation: The time period to submit documentation is 14 business days from the date that you receive a written request from your housing provider asking that you provide documentation of the occurrence of domestic violence, dating violence, sexual assault, or stalking. Your housing provider may, but is not required to, extend the time period to submit the documentation, if you request an extension of the time period. If the requested information is not received within 14 business days of when you received the request for the documentation, or any extension of the date provided by your housing provider, your housing provider does not need to grant you any of the VAWA protections. Distribution or issuance of this form does not serve as a written request for certification.

Confidentiality: All information provided to your housing provider concerning the incident(s) of domestic violence, dating violence, sexual assault, or stalking shall be kept confidential and such details shall not be entered into any shared database. Employees of your housing provider are not to have access to these details unless to grant or deny VAWA protections to you, and such employees may not disclose this information to any other entity or individual, except to the extent that disclosure is: (i) consented to by you in writing in a time-limited release; (ii) required for use in an eviction proceeding or hearing regarding termination of assistance; or (iii) otherwise required by applicable law.

TO BE COMPLETED BY OR ON BEHALF OF THE VICTIM OF DOMESTIC VIOLENCE,
DATING VIOLENCE, SEXUAL ASSAULT, OR STALKING

1. Date the written request is received by victim:

2. Name of victim:

3. Your name (if different from victim's):

4. Name(s) of other family member(s) listed on the lease:

5. Residence of victim:

6. Name of the accused perpetrator (if known and can be safely disclosed):

7. Relationship of the accused perpetrator to the victim:

8. Date(s) and times(s) of incident(s) (if known):

10. Location of incident(s):

This is to certify that the information provided on this form is true and correct to the best of my knowledge and recollection, and that the individual named above in Item 2 is or has been a victim of domestic violence, dating violence, sexual assault, or stalking. I acknowledge that submission of false information could jeopardize program eligibility and could be the basis for denial of admission, termination of assistance, or eviction.

Signature _____ Signed on (Date) _____

Public Reporting Burden: The public reporting burden for this collection of information is estimated to average 1 hour per response. This includes the time for collecting, reviewing, and reporting the data. The information provided is to be used by the housing provider to request certification that the applicant or tenant is a victim of domestic violence, dating violence, sexual assault, or stalking. The information is subject to the confidentiality requirements of VAWA. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid Office of Management and Budget control number.

ATTACHMENT IV

EMERGENCY TRANSFER

REQUEST FOR CERTAIN VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, SEXUAL ASSAULT, OR STALKING

U.S. Department of Housing and Urban
Development
OMB Approval No. 2577-0286
Exp. 06/30/2017
HUD-5383

Purpose of Form: If you are a victim of domestic violence, dating violence, sexual assault, or stalking, and you are seeking an emergency transfer, you may use this form to request an emergency transfer and certify that you meet the requirements of eligibility for an emergency transfer under the Violence Against Women Act (VAWA). Although the statutory name references women, VAWA rights and protections apply to all victims of domestic violence, dating violence, sexual assault, or stalking. Using this form does not necessarily mean that you will receive an emergency transfer. See your housing provider's emergency transfer plan for more information about the availability of emergency transfers.

The requirements you must meet are:

- (1) You are a victim of domestic violence, dating violence, sexual assault, or stalking. If your housing provider does not already have documentation that you are a victim of domestic violence, dating violence, sexual assault, or stalking, your housing provider may ask you for such documentation. In response, you may submit Form HUD-5382, or any one of the other types of documentation listed on that Form.
- (2) You expressly request the emergency transfer. Submission of this form confirms that you have expressly requested a transfer. Your housing provider may choose to require that you submit this form, or may accept another written or oral request. Please see your housing provider's emergency transfer plan for more details.
- (3) You reasonably believe you are threatened with imminent harm from further violence if you remain in your current unit. This means you have a reason to fear that if you do not receive a transfer you would suffer violence in the very near future.

OR

You are a victim of sexual assault and the assault occurred on the premises during the 90-calendar-day period before you request a transfer. If you are a victim of sexual assault, then in addition to qualifying for an emergency transfer because you reasonably believe you are threatened with imminent harm from further violence if you remain in your unit, you may qualify for an emergency transfer if the sexual assault occurred on the premises of the property from which you are seeking your transfer, and that assault happened within the 90-calendar-day period before you submit this form or otherwise expressly request the transfer.

Submission of Documentation: If you have third-party documentation that demonstrates why you are eligible for an emergency transfer, you should submit that documentation to your housing provider if it is safe for you to do so. Examples of third party documentation include, but are not limited to: a letter or other documentation from a victim service provider, social worker, legal assistance provider, pastoral counselor, mental health provider, or other professional from whom you have sought assistance; a current restraining order; a recent court order or other court records; a law enforcement report or records; communication records from the perpetrator of the violence or family members or friends of the perpetrator of the violence, including emails, voicemails, text messages, and social media posts.

Confidentiality: All information provided to your housing provider concerning the incident(s) of domestic violence, dating violence, sexual assault, or stalking, and concerning your request for an emergency transfer shall be kept confidential. Such details shall not be entered into any shared database. Employees of your housing provider are not to have access to these details unless to grant or deny VAWA protections or an emergency transfer to you. Such employees may not disclose this information to any other entity or individual, except to the extent that disclosure is: (i) consented to by you in writing in a time-limited release; (ii) required for use in an eviction proceeding or hearing regarding termination of assistance; or (iii) otherwise required by applicable law.

TO BE COMPLETED BY OR ON BEHALF OF THE PERSON REQUESTING A TRANSFER

1. Name of victim requesting an emergency transfer:

2. Your name (if different from victim's)

3. Name(s) of other family member(s) listed on the lease:

4. Name(s) of other family member(s) who would transfer with the victim:

5. Address of location from which the victim seeks to transfer:

6. Address or phone number for contacting the victim:

7. Name of the accused perpetrator (if known and can be safely disclosed):

8. Relationship of the accused perpetrator to the victim:

9. Date(s), Time(s) and location(s) of incident(s):

10. Is the person requesting the transfer a victim of a sexual assault that occurred in the past 90 days on the premises of the property from which the victim is seeking a transfer? If yes, skip question 11. If no, fill out question 11. _____Yes _____No

11. Describe why the victim believes they are threatened with imminent harm from further violence if they remain in their current unit.

12. If voluntarily provided, list any third-party documentation you are providing along with this notice:

This is to certify that the information provided on this form is true and correct to the best of my knowledge, and that the individual named above in Item 1 meets the requirement laid out on this form for an emergency transfer. I acknowledge that submission of false information could jeopardize program eligibility and could be the basis for denial of admission, termination of assistance, or eviction.

Signature _____ Signed on (Date) _____

RESOLUTION 23-09

**RESOLUTION APPROVING SARASOTA HOUSING AUTHORITY
(SHA) REVISION TO
TEAM MEMBER CULTURE GUIDE**

WHEREAS the Sarasota Housing Authority (SHA) is revising the Team Member Culture Guide;

WHEREAS the provisions of the policy/guide may be amended or cancelled at any time, in the Authority's sole discretion;

WHEREAS several provisions need to be updated; and

WHEREAS the purpose of this Team Member Culture Guide is to provide a source of information for all SHA staff concerning the benefits and obligations associated with their employment.

NOW, THEREFORE, BE IT RESOLVED THAT:

The SHA Board of Commissioners approves the attached Team Member Culture Guide.

ACCEPTED BY: _____ DATE: _____
Jack Meredith,
Chairman

ATTESTED BY: _____ DATE: _____
William O. Russell III,
President & CEO



TEAM MEMBER CULTURE GUIDE

JUNE 4, 2023

Our Mission

“We are committed to provide quality affordable housing to enhance the lives of our residents and promote their independence.”

Our Vision

“Over the next 5 years, SHA will endeavor to further our missions and awareness of the positive attributes of our programs with the following vision in our mind:

- **House more families.**
- **Modernize Bertha Mitchell, McCown, and the Annex.**
- **Revitalize neighborhoods through responsible development, to include Cypress Square, Lofts on Lemon 2, Central Gardens, and Cypress Square 2 and 3.**
- **Enhance the lives of the residents with comprehensive social programs, excellent property management, and customer service.**
- **Market and raise awareness of the positive impact of our programs for the families and neighborhoods.**
- **Foster an entrepreneurial spirit and reduce our dependency on HUD subsidies.”**

Our Core Values

- 1. We value the human dignity in each person.**
- 2. We value honesty.**
- 3. We value diversity.**
- 4. We value curiosity.**
- 5. We value healthy stewardship.**

Holidays

All regular full-time team members are eligible for ten (10) hours of paid time off at their normal base rate for each of the following SHA observed holidays, unless otherwise provided for in this policy:

- New Year's Day
- Martin Luther King Jr.'s Birthday
- President's Day
- ~~Spring Holiday: to be designated annually by the Agency.~~
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Columbus Day
- Thanksgiving Day
- Day After Thanksgiving
- Christmas Holidays: two (2) days in December to be determined annually by the President and CEO

An eligible team member must work the normal working day before *and* after the holiday in order to be paid for that holiday. Approved leave by the team member's supervisor for either of these days would qualify as a working day. Any week in which a holiday referenced above occurs during a weekday, all team members must work at least thirty (30) hours. Regular full-time employees who work fewer than forty (40) hours per week will receive holiday hours on a prorated basis.

Holidays falling on a Friday or Saturday will generally be observed on the preceding Thursday; holidays falling on a Sunday will generally be observed the following Monday (day after the Sunday holiday), at the discretion of the President and CEO. Holidays that occur during a team member's approved paid time off will not be counted as against the team members paid time off.

Due to the nature of SHA's services, SHA reserves the right to schedule any team member to work on any holiday. In this instance, a team member will receive double pay for the holiday.

A team member who wishes to observe religious or other holidays other than those designated above may do so by notifying their supervisor or designated person in writing, at least two (2) weeks prior to such holiday. Late notices may be accepted in certain circumstances at the President and CEO's discretion but may also be rejected. Team members may use PTO for such holiday observance or may take an excused unpaid absence for this purpose if the holiday absence is approved.

Bereavement Leave

In the event of the death of a team member's immediate family member (mother, father, current spouse/domestic partner, child, sister, brother, grandparent, grandparent of the employee's spouse) or other household members, ~~up to one (1) a three (3) working day of paid funeral leave may be taken period, with pay, will be granted to the employee. Where practical, all bereavement leave must be taken within seven (7) days of the death of the family member(s).~~

~~"Immediate family" is defined as a parent, spouse, child, brother, sister, or grandparent of the team member or team member's spouse. Immediate family will also include aunts and uncles of the team member only.~~

MOU between SHA and SHAARC

MOU Business Terms to be Determined by Board:

1. Staff recommends to the board that the properties that shall provide a \$15 per unit per year contribution to the resident council consist only of public housing and RAD properties which currently include: 1. McCown Tower (RAD/LIHTC), 2. Bertha Mitchell as PH/ACC units, and 3. Janie's Garden Phase 1 and Phase II RAD PBV units.

Background: Resident council regulations (24 CFR Part 964) pertain only to public housing and/or RAD units, which were formerly public housing. HUD regulations require that every PHA provide funding each year to a duly formed and elected resident council. The funding amount equates to \$15 per unit per year for every public housing and/or RAD unit. Currently we have a combined 247 units of public housing and RAD units, that would provide SHAARC with \$3,705 per year for their budget.

2. Staff recommends that SHAARC remain in their current office space in the ground floor of the Annex.

Background: Under HUD regulations, PHAs with fewer than 250 public housing units are not required to provide office space to their resident council(s). However, SHA does wish to support SHAARC by providing them their own office space, as long as that is practical. Small PHAs are only required to provide meeting space for resident councils to hold meetings.

SHAARC wishes to return to their former office space. SHA staff wishes for SHAARC to remain in their current Annex office space. The main reason for this is that once the McCown renovation is complete, SHA wishes to better utilize the former SHAARC office space for medical professionals to provide medical appointments for our residents. For the past few years, SHA has been forced to offer only a very small office space next to the board room for medical providers, some of whom have informed us they can't see patients there because it is too small, no access to water, and no storage area for medical supplies and equipment, and not having an area for nurses to meet with patients before being seen by doctor. SHA staff believe that if we offer the former council office to medical providers, we could then expand services to other providers to use that space to provide medical care for our residents.

3. Staff recommends that vending machine and laundry machine revenues (which are already split 50/50 with the laundry machine vendor) not be split with the resident council.

Background: SHA property management at McCown purchase products for and stock the vending machine just outside the Board Room for the use of residents and guests. McCown management has donated some of those funds occasionally in order to help SHAARC provide for food and decorations for events SHAARC has hosted for residents in the Board Room. SHA has laundry machines on every other floor of McCown. However, SHA splits that revenue 50/50 with the laundry machine contractor, who maintains the machines.

Sarasota Housing Authority
Cash Position
May 31, 2023

COCC	653,274.39
HCV - HAP	151,704.93
HCV - Reserve	1,030,158.32
Bertha Mitchell	1,792,278.83
Towers	281,850.69
Annex	2,683,849.84
Energy Grant Program	8,502.86
Resident Services	221,851.94
SVC	711,036.57
SHMC	13,627.45
Towers LIHTC	151,993.49
Bertha Mitchell-SD	47,468.75
Towers - SD	23,290.51
Annex - SD	20,870.40
Rosemary Cohen	203,783.63
Development	2,560,460.84
Towers LIHTC Reserves	928,381.85
Towers LIHTC Construction	144,240.00
Litigations Proceeds	235,950.72
HCV FSS Escrow	254,256.75
PHA FSS Escrow	93,965.24
SHFC - Operating	1,113,115.64
SHFC - Restricted BB&T	115,516.07
SHFC - Reserve	<u>426,534.16</u>
Total	<u><u>13,867,963.87</u></u>

Sarasota Housing Authority
Operating Statement
Five Months Ending 05/31/2023
Program: Towers LIHTC Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
Tenant Revenue	22,627.00	67,300.00	(44,673.00)	113,467.25	336,500.00	(223,032.75)	807,600.00	(694,132.75)
HUD Revenue	19,866.00	0.00	19,866.00	79,565.00	0.00	79,565.00	0.00	79,565.00
Other Operating Revenue	1,621.43	(2,948.67)	4,570.10	6,788.16	(14,743.33)	21,531.49	(35,384.00)	42,172.16
TOTAL INCOME	44,114.43	64,351.33	(20,236.90)	199,820.41	321,756.67	(121,936.26)	772,216.00	(572,395.59)
EXPENSES								
Administrative Expense	20,962.82	16,996.58	(3,966.24)	53,388.59	84,982.92	31,594.33	203,959.00	150,570.41
Tenant Services	196.35	0.00	(196.35)	275.70	0.00	(275.70)	0.00	(275.70)
Utility Expense	16,316.40	12,203.43	(4,112.97)	45,166.22	61,017.07	15,850.85	146,441.00	101,274.78
4935.00 Sewer Expense	7,528.29	0.00	(7,528.29)	7,528.29	0.00	(7,528.29)	0.00	(7,528.29)
Maintenance	18,010.53	7,499.99	(10,510.54)	53,313.95	37,500.01	(15,813.94)	90,000.00	36,686.05
Protective Services	2,433.90	3,750.00	1,316.10	9,024.54	18,750.00	9,725.46	45,000.00	35,975.46
Insurance Expense	142.57	7,500.00	7,357.43	1,155.30	37,500.00	36,344.70	90,000.00	88,844.70
General Expense	25.28	84.33	59.05	(10,575.84)	421.67	10,997.51	1,012.00	11,587.84
TOTAL EXPENSES	65,616.14	48,034.33	(17,581.81)	159,276.75	240,171.67	80,894.92	576,412.00	417,135.25
SURPLUS	(21,501.71)	16,317.00	(37,818.71)	40,543.66	81,585.00	(41,041.34)	195,804.00	(155,260.34)

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: SVC Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
TENANT REVENUE								
3703.00 Tenant Dwelling Rental	98,541.00	31,829.67	66,711.33	194,083.01	63,659.33	130,423.68	381,956.00	(187,872.99)
3704.10 Tenant Revenue - Late Fees	245.00	44.50	200.50	245.00	89.00	156.00	534.00	(289.00)
TOTAL TENANT REVENUE	98,786.00	31,874.17	66,911.83	194,328.01	63,748.33	130,579.68	382,490.00	(188,161.99)
HUD REVENUE								
3707.50 Other Admin Revenue	13,490.90	0.00	13,490.90	13,490.90	0.00	13,490.90	0.00	13,490.90
3707.60 Admin Fees earned	0.00	185,313.83	(185,313.83)	0.00	370,627.67	(370,627.67)	2,223,766.00	(2,223,766.00)
TOTAL HUD REVENUE	13,490.90	185,313.83	(171,822.93)	13,490.90	370,627.67	(357,136.77)	2,223,766.00	(2,210,275.10)
OTHER OPERATING REVENUE								
3714.50 Vacancy Loss	0.00	(318.33)	318.33	0.00	(636.67)	636.67	(3,820.00)	3,820.00
3715.00 Other Revenue	25,708.54	74,269.33	(48,560.79)	25,708.54	148,538.67	(122,830.13)	891,232.00	(865,523.46)
TOTAL OTHER OPERATING REVENUE	25,708.54	73,951.00	(48,242.46)	25,708.54	147,902.00	(122,193.46)	887,412.00	(861,703.46)
TOTAL INCOME	137,985.44	291,139.00	(153,153.56)	233,527.45	582,278.00	(348,750.55)	3,493,668.00	(3,260,140.55)
EXPENSES								
Administrative Expense	18,515.89	33,482.07	14,966.18	24,889.25	66,964.18	42,074.93	401,785.00	376,895.75
Utility Expense	7,526.93	3,531.41	(3,995.52)	(7,018.31)	7,062.84	14,081.15	42,377.00	49,395.31
4935.00 Sewer Expense	7,775.24	0.00	(7,775.24)	7,775.24	0.00	(7,775.24)	0.00	(7,775.24)
Maintenance	35,174.97	5,339.16	(29,835.81)	39,368.43	10,678.34	(28,690.09)	64,070.00	24,701.57
INSURANCE EXPENSE								
4961.01 Property Insurance	0.00	748.75	748.75	6,505.44	1,497.50	(5,007.94)	8,985.00	2,479.56
4961.02 Liability Insurance	0.00	630.00	630.00	0.00	1,260.00	1,260.00	7,560.00	7,560.00
4961.03 Worker's Compensation Insurance	0.00	631.75	631.75	0.00	1,263.50	1,263.50	7,581.00	7,581.00
4961.04 Auto Insurance	(570.50)	0.00	570.50	40.12	0.00	(40.12)	0.00	(40.12)
TOTAL INSURANCE EXPENSE	(570.50)	2,010.50	2,581.00	6,545.56	4,021.00	(2,524.56)	24,126.00	17,580.44
General Expense	68.49	16.08	(52.41)	198.42	32.17	(166.25)	193.00	(5.42)
TOTAL EXPENSES	68,491.02	44,379.22	(24,111.80)	71,758.59	88,758.53	16,999.94	532,551.00	460,792.41
SURPLUS	69,494.42	246,759.78	(177,265.36)	161,768.86	493,519.47	(331,750.61)	2,961,117.00	(2,799,348.14)

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: Sarasota Housing Mgmt Corp Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
3707.10 Management Fee Revenue	1,223.39	0.00	1,223.39	1,223.39	0.00	1,223.39	0.00	1,223.39
TOTAL INCOME	1,223.39	0.00	1,223.39	1,223.39	0.00	1,223.39	0.00	1,223.39
EXPENSES								
TOTAL EXPENSES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
SURPLUS	1,223.39	0.00	(1,223.39)	1,223.39	0.00	(1,223.39)	0.00	(1,223.39)

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: SHFC Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
Tenant Revenue Other	75,545.49	0.00	75,545.49	154,718.25	0.00	154,718.25	0.00	154,718.25
Other Revenue	27,996.93	0.00	27,996.93	30,200.93	0.00	30,200.93	0.00	30,200.93
TOTAL INCOME	103,542.42	0.00	103,542.42	184,919.18	0.00	184,919.18	0.00	184,919.18
EXPENSES								
Administrative Expense	15,891.74	0.00	(15,891.74)	40,110.45	0.00	(40,110.45)	0.00	(40,110.45)
Utilities Expense	6,790.80	0.00	(6,790.80)	3,850.26	0.00	(3,850.26)	0.00	(3,850.26)
4935.00 Sewer Expense	3,897.90	0.00	(3,897.90)	2,629.07	0.00	(2,629.07)	0.00	(2,629.07)
Maintenance	7,566.87	0.00	(7,566.87)	13,199.57	0.00	(13,199.57)	0.00	(13,199.57)
Insurance Expense	2,834.73	0.00	(2,834.73)	10,647.18	0.00	(10,647.18)	0.00	(10,647.18)
General Expense	4,251.15	0.00	(4,251.15)	5,105.20	0.00	(5,105.20)	0.00	(5,105.20)
TOTAL EXPENSES	41,233.19	0.00	(41,233.19)	75,541.73	0.00	(75,541.73)	0.00	(75,541.73)
SURPLUS	62,309.23	0.00	62,309.23	109,377.45	0.00	109,377.45	0.00	109,377.45

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: Section 8 Voucher Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
3704.30 Tenant Revenue - Other	0.00	194.58	(194.58)	0.00	389.17	(389.17)	2,335.00	(2,335.00)
HUD Revenues	1,846,692.18	1,862,799.16	(16,106.98)	3,789,215.05	3,725,598.34	63,616.71	22,353,590.00	(18,564,374.95)
Other Operating Revenue	10,622.52	8,375.50	2,247.02	12,286.30	16,751.00	(4,464.70)	100,506.00	(88,219.70)
TOTAL INCOME	1,857,314.70	1,871,369.24	(14,054.54)	3,801,501.35	3,742,738.51	58,762.84	22,456,431.00	(18,654,929.65)
EXPENSES								
Administrative Expense	137,753.51	122,567.90	(15,185.61)	190,470.33	245,135.85	54,665.52	1,470,815.00	1,280,344.67
4921.03 Resident Services - Tenant	0.00	20.25	20.25	0.00	40.50	40.50	243.00	243.00
Utilities Expense	743.35	0.00	(743.35)	743.35	0.00	(743.35)	0.00	(743.35)
Maintenance	8,246.98	2,121.91	(6,125.07)	9,491.98	4,243.84	(5,248.14)	25,463.00	15,971.02
Insurance	581.05	368.92	(212.13)	2,222.85	737.83	(1,485.02)	4,427.00	2,204.15
General Expense	8,356.58	645.42	(7,711.16)	8,801.50	1,290.83	(7,510.67)	7,745.00	(1,056.50)
4971.50 Misc - Landlord Bonus	7,250.00	1,935.58	(5,314.42)	25,000.00	3,871.17	(21,128.83)	23,227.00	(1,773.00)
4971.51 EHV Reimbursables	0.00	1,470.25	1,470.25	0.00	2,940.50	2,940.50	17,643.00	17,643.00
HAP Expense	2,032,853.28	1,663,309.08	(369,544.20)	3,980,678.12	3,326,618.17	(654,059.95)	19,959,709.00	15,979,030.88
TOTAL EXPENSES	2,195,784.75	1,792,439.31	(403,345.44)	4,217,408.13	3,584,878.69	(632,529.44)	21,509,272.00	17,291,863.87
SURPLUS	(338,470.05)	78,929.93	(417,399.98)	(415,906.78)	157,859.82	(573,766.60)	947,159.00	(1,363,065.78)

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023

Program: Resident Services Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
3706.20 ROSS Grant	5,810.67	0.00	5,810.67	11,621.34	0.00	11,621.34	0.00	11,621.34
3706.30 HUD FSS Grant	13,574.82	0.00	13,574.82	13,574.82	0.00	13,574.82	0.00	13,574.82
3707.50 Other Admin Revenue	1,520.00	0.00	1,520.00	3,040.00	0.00	3,040.00	0.00	3,040.00
3707.51 Other Admin Revenue: YT	2,800.00	0.00	2,800.00	2,800.00	0.00	2,800.00	0.00	2,800.00
TOTAL INCOME	23,705.49	0.00	23,705.49	31,036.16	0.00	31,036.16	0.00	31,036.16
EXPENSES								
4911.00 Administrative Salaries	27,510.67	0.00	(27,510.67)	36,940.00	0.00	(36,940.00)	0.00	(36,940.00)
4915.00 Administrative EBC Expenses	5,508.96	0.00	(5,508.96)	8,958.91	0.00	(8,958.91)	0.00	(8,958.91)
4916.00 Office Supplies Expense	51.49	0.00	(51.49)	51.49	0.00	(51.49)	0.00	(51.49)
4919.01 Telephone Expense	389.45	0.00	(389.45)	828.31	0.00	(828.31)	0.00	(828.31)
4919.02 Dues/Subsription Expense	24.63	0.00	(24.63)	50.26	0.00	(50.26)	0.00	(50.26)
4919.04 Training Expense	40.75	0.00	(40.75)	72.03	0.00	(72.03)	0.00	(72.03)
4919.09 Office Lease Expense	501.36	0.00	(501.36)	1,002.72	0.00	(1,002.72)	0.00	(1,002.72)
4919.11 Internet Expense	462.61	223.50	(239.11)	462.61	447.00	(15.61)	2,682.00	2,219.39
4919.112 YT Internet	483.98	223.50	(260.48)	483.98	447.00	(36.98)	2,682.00	2,198.02
4919.12 Investigations	29.99	3.50	(26.49)	29.99	7.00	(22.99)	42.00	12.01
4919.15 Admin. General Contracts	855.75	0.00	(855.75)	855.75	0.00	(855.75)	0.00	(855.75)
4919.16 Admin. Equipment Contracts	167.83	0.00	(167.83)	167.83	0.00	(167.83)	0.00	(167.83)
4919.161 Admin Equip Contracts: YT	0.00	29.50	29.50	0.00	59.00	59.00	354.00	354.00
4921.02 Resident Services EBC Expenses	2,020.73	911.42	(1,109.31)	2,020.73	1,822.83	(197.90)	10,937.00	8,916.27
4921.03 Resident Services Tenant Servc	0.00	7.25	7.25	2,500.00	14.50	(2,485.50)	87.00	(2,413.00)
4921.09 YT- After School Tutors	800.00	184.92	(615.08)	800.00	369.83	(430.17)	2,219.00	1,419.00
4921.11 YT- Program Supplies/Activities	231.18	0.00	(231.18)	2,731.18	0.00	(2,731.18)	0.00	(2,731.18)
4921.111 YT- Program Supplies/Activities	679.75	701.83	22.08	1,579.75	1,403.67	(176.08)	8,422.00	6,842.25
4921.12 YT- Printing/Advertising	0.00	144.42	144.42	0.00	288.83	288.83	1,733.00	1,733.00
4921.13 YT- Travel/Training	1,086.00	4.75	(1,081.25)	1,086.00	9.50	(1,076.50)	57.00	(1,029.00)
4921.14 Shop with a Cop	0.00	166.00	166.00	0.00	332.00	332.00	1,992.00	1,992.00
4932.00 Electricity Expense	744.21	60.58	(683.63)	482.86	121.17	(361.69)	727.00	244.14
4942.16 Hardware	0.00	3.83	3.83	0.00	7.67	7.67	46.00	46.00
4942.18 HVAC Parts	0.00	86.33	86.33	0.00	172.67	172.67	1,036.00	1,036.00
4942.20 Janitorial Supplies	0.00	13.92	13.92	0.00	27.83	27.83	167.00	167.00
4942.28 Lumber	0.00	11.83	11.83	0.00	23.67	23.67	142.00	142.00
4942.30 Miscellaneous Materials	46.99	0.00	(46.99)	46.99	0.00	(46.99)	0.00	(46.99)
4942.34 Paint/Drywall	0.00	30.83	30.83	0.00	61.67	61.67	370.00	370.00
4942.36 Plumbing parts	0.00	31.67	31.67	0.00	63.33	63.33	380.00	380.00
4943.01 Alarm Expense	35.00	32.33	(2.67)	70.00	64.67	(5.33)	388.00	318.00
4943.04 Electrical Expense	0.00	286.00	286.00	0.00	572.00	572.00	3,432.00	3,432.00
4943.05 Plumbing Expense	0.00	777.08	777.08	0.00	1,554.17	1,554.17	9,325.00	9,325.00
4943.06 HVAC Expense	0.00	10.42	10.42	0.00	20.83	20.83	125.00	125.00

	Period	Period	Period	YTD	YTD	YTD	Annual	Remaining
	Amount	Budget	Variance	Amount	Budget	Variance	Budget	Budget
4943.10 Routine Maintenance Exp.	624.96	407.33	(217.63)	874.96	814.67	(60.29)	4,888.00	4,013.04
4943.101 YT- Routing Maintenance	124.68	216.67	91.99	124.68	433.33	308.65	2,600.00	2,475.32
4943.12 Equipment Leasing	0.00	32.00	32.00	0.00	64.00	64.00	384.00	384.00
4952.00 Protective Services Expense	0.00	4.08	4.08	0.00	8.17	8.17	49.00	49.00
4961.04 Auto Insurance	439.56	405.58	(33.98)	436.88	811.17	374.29	4,867.00	4,430.12
4962.00 General Expenses	64.53	83.58	19.05	127.04	167.17	40.13	1,003.00	875.96
TOTAL EXPENSES	42,925.06	5,094.65	(37,830.41)	62,784.95	10,189.35	(52,595.60)	61,136.00	(1,648.95)
SURPLUS	(19,219.57)	(5,094.65)	(14,124.92)	(31,748.79)	(10,189.35)	(21,559.44)	(61,136.00)	29,387.21

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: Energy Grant Program Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
TOTAL INCOME	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
EXPENSES								
4911.00 Administrative Salaries	4,984.88	0.00	(4,984.88)	6,733.13	0.00	(6,733.13)	0.00	(6,733.13)
4915.00 Administrative EBC Expenses	1,521.28	0.00	(1,521.28)	2,709.32	0.00	(2,709.32)	0.00	(2,709.32)
4922.00 Relocation Expenses	0.00	0.00	0.00	394.00	0.00	(394.00)	0.00	(394.00)
4942.26 Lighting/Fixtures	9,592.16	0.00	(9,592.16)	9,592.16	0.00	(9,592.16)	0.00	(9,592.16)
4942.30 Miscellaneous Materials	33.57	0.00	(33.57)	33.57	0.00	(33.57)	0.00	(33.57)
4962.00 General Expenses	5,011.41	0.00	(5,011.41)	5,023.84	0.00	(5,023.84)	0.00	(5,023.84)
TOTAL EXPENSES	21,143.30	0.00	(21,143.30)	24,486.02	0.00	(24,486.02)	0.00	(24,486.02)
SURPLUS	(21,143.30)	0.00	21,143.30	(24,486.02)	0.00	24,486.02	0.00	24,486.02

Sarasota Housing Authority

Operating Statement

Two Months Ending 05/31/2023

Program: Bertha Mitchell Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
Tenant Revenue	31,909.00	41,486.83	(9,577.83)	63,818.00	82,973.67	(19,155.67)	497,842.00	(434,024.00)
HUD Revenues	45,239.86	181,726.17	(136,486.31)	101,454.35	363,452.33	(261,997.98)	2,180,714.00	(2,079,259.65)
Other Operating Revenue	29,343.18	24,435.58	4,907.60	32,275.30	48,871.17	(16,595.87)	293,227.00	(260,951.70)
TOTAL INCOME	106,492.04	247,648.58	(141,156.54)	197,547.65	495,297.17	(297,749.52)	2,971,783.00	(2,774,235.35)
EXPENSES								
Administrative Expense	55,604.76	52,771.73	(2,833.03)	67,881.22	105,543.52	37,662.30	633,261.00	565,379.78
Tenant Services	2,201.75	150.17	(2,051.58)	2,201.75	300.33	(1,901.42)	1,802.00	(399.75)
Utility Expense	11,855.79	41,567.67	29,711.88	24,351.65	83,135.33	58,783.68	498,812.00	474,460.35
4935.00 Sewer Expense	8,582.48	0.00	(8,582.48)	8,582.48	0.00	(8,582.48)	0.00	(8,582.48)
Maintenance	67,034.94	39,766.15	(27,268.79)	69,352.53	79,532.35	10,179.82	477,194.00	407,841.47
Protective Services	0.00	98.25	98.25	0.00	196.50	196.50	1,179.00	1,179.00
Insurance Expense	914.47	7,468.08	6,553.61	14,212.42	14,936.17	723.75	89,617.00	75,404.58
General Expense	2,454.19	6,947.42	4,493.23	4,695.72	13,894.83	9,199.11	83,369.00	78,673.28
TOTAL EXPENSES	148,648.38	148,769.47	121.09	191,277.77	297,539.03	106,261.26	1,785,234.00	1,593,956.23
SURPLUS	(42,156.34)	98,879.11	141,035.45	6,269.88	197,758.14	191,488.26	1,186,549.00	1,180,279.12

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: Business Activities Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
Other Operating Revenue	3,912.65	0.00	3,912.65	7,030.47	0.00	7,030.47	0.00	7,030.47
TOTAL INCOME	3,912.65	0.00	3,912.65	7,030.47	0.00	7,030.47	0.00	7,030.47
EXPENSES								
Administrative Expense	5,770.64	0.00	(5,770.64)	8,401.34	0.00	(8,401.34)	0.00	(8,401.34)
4921.04 Resident Services - Council fee	158.70	0.00	(158.70)	158.70	0.00	(158.70)	0.00	(158.70)
Utilities Expense	0.00	0.00	0.00	(34.13)	0.00	34.13	0.00	34.13
Maintenance	324.22	0.00	(324.22)	403.40	0.00	(403.40)	0.00	(403.40)
Insurance Expense	1,047.66	0.00	(1,047.66)	2,095.32	0.00	(2,095.32)	0.00	(2,095.32)
General Expense	3.80	0.00	(3.80)	8.22	0.00	(8.22)	0.00	(8.22)
TOTAL EXPENSES	7,305.02	0.00	(7,305.02)	11,032.85	0.00	(11,032.85)	0.00	(11,032.85)
SURPLUS	(3,392.37)	0.00	3,392.37	(4,002.38)	0.00	4,002.38	0.00	4,002.38

Sarasota Housing Authority
Operating Statement
Two Months Ending 05/31/2023
Program: Annex Project: Consolidated

	Period Amount	Period Budget	Period Variance	YTD Amount	YTD Budget	YTD Variance	Annual Budget	Remaining Budget
INCOME								
Tenant Revenue	24,446.66	24,325.91	120.75	50,180.88	48,651.84	1,529.04	291,911.00	(241,730.12)
HUD Revenue	81,802.00	85,379.50	(3,577.50)	162,009.00	170,759.00	(8,750.00)	1,024,554.00	(862,545.00)
Other Operating Revenue	3,288.41	(384.00)	3,672.41	3,290.12	(768.00)	4,058.12	(4,608.00)	7,898.12
TOTAL INCOME	109,537.07	109,321.41	215.66	215,480.00	218,642.84	(3,162.84)	1,311,857.00	(1,096,377.00)
EXPENSES								
Administrative Expense	53,403.80	34,124.43	(19,279.37)	69,953.87	68,248.82	(1,705.05)	409,493.00	339,539.13
Tenant Services	117.00	2.00	(115.00)	117.00	4.00	(113.00)	24.00	(93.00)
Utility Expense	17,792.96	9,081.08	(8,711.88)	12,654.96	18,162.17	5,507.21	108,973.00	96,318.04
4935.00 Sewer Expense	10,755.96	0.00	(10,755.96)	5,266.21	0.00	(5,266.21)	0.00	(5,266.21)
Maintenance	23,132.65	13,436.67	(9,695.98)	27,523.49	26,873.33	(650.16)	161,240.00	133,716.51
Protective Services	3,971.10	3,662.83	(308.27)	7,619.62	7,325.67	(293.95)	43,954.00	36,334.38
Insurance Expense	90.02	2,731.92	2,641.90	11,178.90	5,463.83	(5,715.07)	32,783.00	21,604.10
4962.00 General Expenses	171.40	1,389.00	1,217.60	442.90	2,778.00	2,335.10	16,668.00	16,225.10
TOTAL EXPENSES	109,434.89	64,427.93	(45,006.96)	134,756.95	128,855.82	(5,901.13)	773,135.00	638,378.05
SURPLUS	102.18	44,893.48	44,791.30	80,723.05	89,787.02	9,063.97	538,722.00	457,998.95

Janies Garden Balance Sheet

May 31, 2023

Assets

Current Assets

Cash

PETTY CASH	400.00
CASH IN BANK GENERAL	31,185.17
CASH IN BANK - SECURITY DEPOSITS	49,694.65
Total Cash	<u>81,279.82</u>

Accounts Receivable

A/R - RESIDENTS	5,454.63
Voucher / PBV - Suspense	(2,852.00)
A/R - PBV SUBSIDY	215.00
A/R - VOUCHER SUBSIDY	425.00
DUE FROM PARTNERS	200.00
DUE TO/FROM-OTHERS (OPERATIONS)	42,001.26
ALLOWANCE FOR DOUBTFUL ACCOUNTS	(2,130.44)
Total Accounts Receivable	<u>43,313.45</u>

Deposits & Escrows

REAL ESTATE TAX ESCROW	57,065.04
PROPERTY & LIABILITY INSURANCE ESCROW	123,911.70
RESERVE FOR REPLACEMENTS	39,472.46
OPERATING RESERVE FUND	215,718.45
Total Deposits & Escrows	<u>436,167.65</u>

Other Current Assets

PREPAID PROPERTY INSURANCE	33,724.00
MISC PREPAID EXPENSE	118.25
Total Other Current Assets	<u>33,842.25</u>

Total Current Assets 594,603.17

Fixed Assets

LAND	559,730.00
BUILDINGS	14,771,868.18

Depreciation & Amortization

ACC DEPR BUILDINGS	(8,152,764.00)
Total Depreciation & Amortization	<u>(8,152,764.00)</u>

Total Fixed Assets 7,178,834.18

Other Assets

DEPOSITS - RECEIVABLE	24,203.47
START-UP COSTS	59,000.18
LIHTC FEE	211,731.00
ACCUM. AMORT. - LIHTC MONITORING FEE	(190,604.00)
ACC - AMORT FINANCING FEES (Old)	(60,910.00)
RAR ADJ - ACCUM AMORTIZATION	(59,000.00)
Total Other Assets	<u>(15,579.35)</u>

Total Assets

7,757,858.00

Janies Garden Balance Sheet

May 31, 2023

Liabilities & Equity

Liabilities

Current Liabilities

DEVELOPMENT FEE PAYABLE	292,683.66
ACCOUNTS PAYABLE	16,424.08
ACCOUNTS PAYABLE - OTHER	30,000.00
ACCRUED 1ST MORTGAGE INTEREST PAYABLE	8,058.00
ACCRUED INTEREST PAYABLE - 2ND MORTG.	2,637,231.38
ACCRUED INTEREST - M.J. LEVITT	47,606.13
ACCRUED EXPENSE	7,625.00
ACCRUED PARTNERSHIP EXPENSES	165,468.03
SECURITY DEPOSIT REFUNDS IN TRANSIT	1,612.00
Total Current Liabilities	<u>3,206,708.28</u>

Other Current Liabilities

SECURITY DEPOSIT LIABILITY	49,664.49
SECURITY DEP INT LIABILITY	441.71
PREPAID RENTS	23,433.59
Total Other Current Liabilities	<u>73,539.79</u>

Long Term Liabilities

DEFERRED FINANCING FEES	(113,408.68)
1ST MORTGAGE PAYABLE	1,477,135.29
SECOND MORTGAGE PAYABLE (Old)	325,000.00
OTHER MORTGAGE PAYABLE (Old)	1,869,500.00
LOAN PAYABLE	765,000.00
Total Long Term Liabilities	<u>4,323,226.61</u>

Total Liabilities 7,603,474.68

Equity

Retained Earnings	59,622.97
Current Net Income	94,760.35
Total Equity	<u>154,383.32</u>

Total Liabilities & Equity 7,757,858.00

Janies Garden Budget Operating Report As of May 31, 2023

	Month Ending 05/31/2023			01/01/2023 Through 05/31/2023			Year Ending 12/31/2023
	Actual	Budget	Budget Diff	Actual	Budget	Budget Diff	Budget
RENT INCOME							
512000 - APARTMENT RENT - TENANT	49,774.00	77,500.00	(27,726.00)	249,012.00	387,500.00	(138,488.00)	930,000.00
512100 - SUBSIDY REVENUE	32,970.00	0.00	32,970.00	164,978.00	0.00	164,978.00	0.00
TOTAL RENT INCOME	82,744.00	77,500.00	5,244.00	413,990.00	387,500.00	26,490.00	930,000.00
VACANCIES							
522000 - VACANCIES - TENANT	(3,101.00)	(1,666.00)	(1,435.00)	(9,832.00)	(8,330.00)	(1,502.00)	(20,000.00)
528000 - EMPLOYEE APARTMENT/DISCOUNT	(850.00)	(850.00)	0.00	(4,250.00)	(4,250.00)	0.00	(10,200.00)
TOTAL VACANCIES	(3,951.00)	(2,516.00)	(1,435.00)	(14,082.00)	(12,580.00)	(1,502.00)	(30,200.00)
NET RENTAL INCOME	78,793.00	74,984.00	3,809.00	399,908.00	374,920.00	24,988.00	899,800.00
SERVICES INCOME							
531000 - COIN OPERATIONS	0.00	21.00	(21.00)	0.00	105.00	(105.00)	250.00
533000 - TENANT APPLICATION FEE	90.00	100.00	(10.00)	480.00	500.00	(20.00)	1,200.00
TOTAL SERVICES INCOME	90.00	121.00	(31.00)	480.00	605.00	(125.00)	1,450.00
FINANCIAL INCOME							
541200 - INT INC - RESERVES & ESCROWS	9.16	0.00	9.16	35.76	0.00	35.76	0.00
TOTAL FINANCIAL INCOME	9.16	0.00	9.16	35.76	0.00	35.76	0.00
OTHER INCOME							
592500 - LATE CHARGES	1,050.00	383.00	667.00	4,230.00	1,915.00	2,315.00	4,950.00
593000 - RETURNED CHECKS CHARGES	50.00	0.00	50.00	75.00	0.00	75.00	0.00
593900 - DAMAGES	209.08	300.00	(90.92)	2,401.63	1,500.00	901.63	3,596.00
594000 - PET FEE	0.00	0.00	0.00	150.00	0.00	150.00	0.00
TOTAL OTHER INCOME	1,309.08	683.00	626.08	6,856.63	3,415.00	3,441.63	8,546.00
TOTAL INCOME	80,201.24	75,788.00	4,413.24	407,280.39	378,940.00	28,340.39	909,796.00
TOTAL CORPORATE EXPENSES							
RENTING EXPENSES							
621000 - ADVERTISING	0.00	93.00	93.00	729.18	465.00	(264.18)	756.00
622500 - CREDIT REPORTS	721.05	88.00	(633.05)	1,141.14	440.00	(701.14)	1,012.00
624500 - INSPECTION FEES	0.00	0.00	0.00	0.00	200.00	200.00	400.00
625500 - EVICTION EXPENSE	0.00	367.00	367.00	0.00	1,835.00	1,835.00	4,000.00
629000 - MISC RENTING EXPENSE	0.00	14.00	14.00	0.00	70.00	70.00	168.00
TOTAL RENTING EXPENSES	721.05	562.00	(159.05)	1,870.32	3,010.00	1,139.68	6,336.00
ADMINISTRATIVE EXPENSES							
631000 - OFFICE PAYROLL	2,368.11	3,238.00	869.89	7,902.14	11,878.00	3,975.86	28,841.00
631100 - OFFICE EXPENSE	304.91	434.00	129.09	979.25	2,170.00	1,190.75	5,204.00
631111 - BANK CHARGES	0.00	48.00	48.00	240.74	1,064.00	823.26	1,400.00
631500 - OFFICE EQUIPMENT EXPENSE	0.00	160.00	160.00	0.00	470.00	470.00	1,040.00
631502 - OFFICE/COMPUTER - SERVICES	778.15	0.00	(778.15)	778.15	615.00	(163.15)	2,460.00
632000 - MANAGEMENT FEES	5,026.88	4,400.00	(626.88)	24,201.13	22,000.00	(2,201.13)	52,800.00
632500 - ANSWERING SERVICE	0.00	33.00	33.00	0.00	165.00	165.00	400.00
633000 - SITE MANAGER'S PAYROLL EXPENSE	2,261.60	2,047.00	(214.60)	8,438.38	7,659.00	(779.38)	18,759.00
634000 - LEGAL EXPENSE	601.00	0.00	(601.00)	601.00	0.00	(601.00)	0.00
634200 - TAX CREDIT COMPLIANCE/MONITORING FEE	500.00	0.00	(500.00)	500.00	0.00	(500.00)	500.00
635000 - AUDIT EXPENSE	0.00	0.00	0.00	6,500.00	2,500.00	(4,000.00)	10,000.00
635300 - ALLOC. CENTRALIZED COMPLIANCE COSTS	0.00	0.00	0.00	566.82	595.00	28.18	2,380.00
635400 - SOFTWARE LICENSE EXPENSE	101.61	0.00	(101.61)	5,312.82	5,500.00	187.18	5,500.00
636000 - TELEPHONE	284.73	153.00	(131.73)	1,452.72	774.00	(678.72)	1,845.00
637000 - BAD DEBT EXPENSE	6,847.00	420.21	(6,426.79)	6,847.00	2,101.05	(4,745.95)	5,000.00
637600 - SOCIAL SERVICE SUPPLIES	181.35	167.00	(14.35)	648.35	835.00	186.65	2,000.00
637604 - SOCIAL SERVICE EXPENSE - 3rd Party	2,857.09	2,791.00	(66.09)	10,056.80	13,955.00	3,898.20	33,492.00
638400 - TRAINING EXPENSE	0.00	450.00	450.00	2,006.27	1,050.00	(956.27)	2,100.00
638500 - TRAVEL EXPENSE	0.00	95.00	95.00	0.00	475.00	475.00	1,140.00
639000 - MISC ADMINISTRATIVE EXPENSE	368.75	250.00	(118.75)	368.75	1,250.00	881.25	3,000.00
639002 - MISC ADMIN EXP - Consultant Fees	0.00	0.00	0.00	650.00	0.00	(650.00)	0.00
Total ADMINISTRATIVE EXPENSES	22,481.18	14,686.21	(7,794.97)	78,050.32	75,056.05	(2,994.27)	177,861.00
OPERATING EXPENSE							
641900 - UNIFORMS EXPENSE	0.00	250.00	250.00	0.00	250.00	250.00	500.00
643000 - MAINTENANCE PAYROLL	2,220.61	6,169.00	3,948.39	13,715.92	22,621.00	8,905.08	54,768.00
643100 - JANITOR SUPPLIES	126.14	250.00	123.86	499.09	1,250.00	750.91	2,000.00
645000 - ELECTRICITY	497.52	833.00	335.48	2,547.56	4,165.00	1,617.44	10,000.00
645050 - ELECTRICITY - Vacant Unit	57.91	0.00	(57.91)	228.94	0.00	(228.94)	0.00
645100 - WATER	3,176.91	4,000.00	823.09	18,223.96	20,000.00	1,776.04	48,000.00
645300 - SEWER	4,412.32	4,836.00	423.68	24,300.04	24,180.00	(120.04)	58,000.00
645500 - UTILITY PROCESSING / COMMISSIONS	82.56	86.00	3.44	330.24	430.00	99.76	1,032.00
646000 - EXTERMINATING	0.00	2,015.00	2,015.00	3,726.91	3,975.00	248.09	7,000.00
647000 - GARBAGE & RUBBISH REMOVAL	3,597.34	2,499.60	(1,097.74)	16,878.40	12,498.00	(4,380.40)	30,000.00

Janies Garden

Budget Operating Report

As of May 31, 2023

	Month Ending 05/31/2023			01/01/2023 Through 05/31/2023			Year Ending 12/31/2023
	Actual	Budget	Budget Diff	Actual	Budget	Budget Diff	Budget
647100 - FIRE SERVICE FEE / REPAIRS	559.70	832.50	272.80	7,046.85	4,162.50	(2,884.35)	9,995.00
649000 - MISC OPERATING EXPENSE	0.00	166.00	166.00	0.00	830.00	830.00	2,000.00
TOTAL OPERATING EXPENSE	14,731.01	21,937.10	7,206.09	87,497.91	94,361.50	6,863.59	223,295.00
MAINTENANCE EXPENSE							
652000 - GROUNDS	0.00	0.00	0.00	400.00	0.00	(400.00)	0.00
652001 - GROUNDS - Supplies	0.00	0.00	0.00	0.00	2,000.00	2,000.00	2,000.00
652002 - GROUNDS - Contract	1,595.00	1,754.50	159.50	8,175.00	8,772.50	597.50	21,100.00
653000 - EXTERIOR PAINTING / REPAIRS	0.00	582.40	582.40	1,067.14	2,923.00	1,855.86	6,999.80
653500 - CLEANING EXPENSE	500.00	58.00	(442.00)	1,415.00	290.00	(1,125.00)	700.00
654100 - REPAIRS - APPLIANCES	96.85	250.00	153.15	1,054.24	1,750.00	695.76	2,500.00
654200 - REPAIRS - CARPET & FLOORS	0.00	304.00	304.00	1,590.00	1,570.00	(20.00)	2,996.00
654300 - REPAIRS - CARPENTRY	318.59	583.05	264.46	1,340.35	2,915.25	1,574.90	7,002.45
654307 - REPAIRS - Hardware	0.00	0.00	0.00	10.90	0.00	(10.90)	0.00
654400 - REPAIRS - ELECTRICAL	219.47	150.00	(69.47)	2,610.10	750.00	(1,860.10)	2,000.00
654600 - REPAIRS - PLUMBING	294.53	360.00	65.47	2,281.95	2,088.00	(193.95)	5,040.00
654709 - REPAIRS - PROP DAMAGE/CLAIMS (OTHER / SANDY)	2,399.76	0.00	(2,399.76)	2,399.76	0.00	(2,399.76)	0.00
654800 - SERVICE CONTRACTS	0.00	46.00	46.00	254.32	679.00	424.68	1,000.00
655100 - REPAIRS - HVAC	3,784.39	667.20	(3,117.19)	9,431.17	3,336.00	(6,095.17)	8,000.00
656000 - DECORATING EXPENSE	956.62	835.00	(121.62)	7,054.77	4,175.00	(2,879.77)	10,000.00
657000 - MOTOR VEHICLE REPAIRS	0.00	124.50	124.50	0.00	622.50	622.50	1,500.00
658500 - SMALL TOOLS EXPENSE	4.11	0.00	(4.11)	198.20	300.00	101.80	600.00
659000 - MISC MAINTENANCE EXPENSE	0.00	0.00	0.00	75.00	500.00	425.00	500.00
TOTAL MAINTENANCE EXPENSE	10,169.32	5,714.65	(4,454.67)	39,357.90	32,671.25	(6,686.65)	71,938.25
INTEREST EXPENSE							
682000 - 1ST MORTGAGE INTEREST	7,714.73	7,715.00	0.27	39,043.14	39,043.00	(0.14)	93,481.00
TOTAL INTEREST EXPENSE	7,714.73	7,715.00	0.27	39,043.14	39,043.00	(0.14)	93,481.00
TAXES & INSURANCE							
671000 - TAXES - REAL ESTATE	0.00	0.00	0.00	0.00	0.00	0.00	42,000.00
671100 - PAYROLL TAXES	508.20	885.00	376.80	2,339.48	4,220.00	1,880.52	8,868.00
672000 - INSURANCE EXPENSE	49,103.97	0.00	(49,103.97)	49,103.97	63,300.00	14,196.03	167,800.00
672100 - HEALTH INSURANCE	256.03	1,300.00	1,043.97	2,270.32	6,500.00	4,229.68	15,600.00
672200 - WORKERS COMP INSURANCE	92.73	254.00	161.27	491.04	938.00	446.96	2,274.00
672300 - LITIGATION SETTLEMENT	0.00	167.00	167.00	1,086.00	835.00	(251.00)	2,000.00
672500 - EMPLOYEE BENEFITS	362.98	325.00	(37.98)	1,687.13	1,625.00	(62.13)	3,900.00
TOTAL TAXES & INSURANCE	50,323.91	2,931.00	(47,392.91)	56,977.94	77,418.00	20,440.06	242,442.00
OTHER EXPENSES							
687000 - AGENCY SERVICE FEE	0.00	0.00	0.00	262.50	400.00	137.50	1,000.00
TOTAL OTHER EXPENSES	0.00	0.00	0.00	262.50	400.00	137.50	1,000.00
EQUIPMENT PURCHASES							
721101 - Kitchen Appliances	0.00	1,000.00	1,000.00	2,416.37	3,000.00	583.63	4,500.00
721102 - Flooring: Carpet & Tile	1,687.31	1,000.00	(687.31)	3,854.42	5,000.00	1,145.58	10,000.00
721103 - Cabinets/Countertops	0.00	0.00	0.00	320.00	0.00	(320.00)	0.00
721105 - Water Heaters	0.00	0.00	0.00	0.00	500.00	500.00	500.00
721106 - HVAC Equipment	216.00	2,000.00	1,784.00	2,869.22	8,500.00	5,630.78	10,000.00
TOTAL EQUIPMENT PURCHASES	1,903.31	4,000.00	2,096.69	9,460.01	17,000.00	7,539.99	25,000.00
TOTAL CORPORATE EXPENSES	108,044.51	57,545.96	(50,498.55)	312,520.04	338,959.80	26,439.76	841,353.25
NET PROFIT OR LOSS	(27,843.27)	18,242.04	(46,085.31)	94,760.35	39,980.20	54,780.15	68,442.75
NON-OPERATING EXPENSES							
790100 - R/E TAXE ESCROW DEPOSITS	4,085.00	3,500.00	(585.00)	20,425.00	17,500.00	(2,925.00)	42,000.00
790101 - R/E TAXE ESCROW WITHDRAWALS	0.00	0.00	0.00	0.00	0.00	0.00	(42,000.00)
790200 - PROPERTY INSURANCE ESC DEP	11,400.00	13,875.00	2,475.00	87,000.00	69,375.00	(17,625.00)	166,500.00
790201 - PROPERTY INS ESC WITHDRAWALS	(49,103.97)	0.00	49,103.97	(49,103.97)	(63,300.00)	(14,196.03)	(166,500.00)
791000 - PROV FOR REPLACEMENTS	2,242.71	2,243.00	0.29	11,213.55	11,215.00	1.45	27,251.00
791100 - RFR REIMBURSEMENTS	0.00	0.00	0.00	0.00	(15,000.00)	(15,000.00)	(15,000.00)
793000 - PROV FOR MORT PRIN AMORT	4,093.79	4,094.00	0.21	19,999.46	19,999.00	(0.46)	48,222.00
TOTAL NON-OPERATING EXPENSES	(27,282.47)	23,712.00	50,994.47	89,534.04	39,789.00	(49,745.04)	60,473.00
NET CASH (+) / DEF (-)	(560.80)	(5,469.96)	4,909.16	5,226.31	191.20	5,035.11	7,969.75

Janies Garden II
Balance Sheet
May 31, 2023

Assets

Current Assets

Cash

PETTY CASH	400.00
CASH IN BANK GENERAL	(6,226.57)
CASH IN BANK- RECONCILIATION	3,303.58
CASH IN BANK - SECURITY DEPOSITS	41,703.72
Total Cash	39,180.73

Accounts Receivable

A/R - RESIDENTS	19,878.33
A/R - COMMERCIAL TENANTS	735.00
Voucher / PBV - Suspense	(1,810.00)
A/R - PBV SUBSIDY	2,191.00
A/R - VOUCHER SUBSIDY	857.00
DUE FROM PARTNERS	200.00
DUE TO/FROM-OTHERS (OPERATIONS)	4,780.02
GRANT RECEIVABLE	4,797.68
EXCHANGE	(854.00)
NEW RESIDENT - RENT & SEC DEP PAYMENTS	84.00
ALLOWANCE FOR DOUBTFUL ACCOUNTS	(8,955.95)
Total Accounts Receivable	21,903.08

Deposits & Escrows

DEBT SERVICE RESERVE FUND	165,804.09
REAL ESTATE TAX ESCROW	28,895.88
PROPERTY & LIABILITY INSURANCE ESCROW	136,335.09
RESERVE FOR REPLACEMENTS	129,900.17
ESCROWS - OTHER	92,891.35
OPERATING RESERVE FUND	90,607.86
Total Deposits & Escrows	644,434.44

Other Current Assets

PREPAID PROPERTY INSURANCE	22,729.00
MISC PREPAID EXPENSE	96.75
Total Other Current Assets	22,825.75

Total Current Assets

728,344.00

Fixed Assets

LAND	150,000.00
BUILDINGS	11,257,899.91

Depreciation & Amortization

ACC DEPR BUILDINGS	(5,320,841.00)
Total Depreciation & Amortization	(5,320,841.00)

Total Fixed Assets

6,087,058.91

Other Assets

DEPOSITS - RECEIVABLE	4,449.84
START-UP COSTS	53,000.00
LIHTC FEE	141,101.64
ACCUM. AMORT. - LIHTC MONITORING FEE	(112,783.00)
ACC - AMORT FINANCING FEES (Old)	(71,843.00)

Janies Garden II

Balance Sheet

May 31, 2023

RAR ADJ - ACCUM AMORTIZATION	(53,000.00)
Total Other Assets	<u>(39,074.52)</u>
Total Assets	<u><u>6,776,328.39</u></u>

Janies Garden II
Balance Sheet
May 31, 2023

Liabilities & Equity

Liabilities

Current Liabilities

DEVELOPMENT FEE PAYABLE	2,221.00
ACCOUNTS PAYABLE	29,672.90
ACCRUED INTEREST PAYABLE - 3RD MORTG.	38,763.76
ACCRUED EXPENSE	7,866.00
SECURITY DEPOSIT REFUNDS IN TRANSIT	1,756.66

Total Current Liabilities 80,280.32

Other Current Liabilities

SECURITY DEPOSIT LIABILITY	39,458.87
SECURITY DEP INT LIABILITY	181.48
PREPAID RENTS	24,892.87

Total Other Current Liabilities 64,533.22

Long Term Liabilities

DEFERRED FINANCING FEES	(239,467.00)
1ST MORTGAGE PAYABLE	1,685,000.79
SECOND MORTGAGE PAYABLE (Old)	6,743,500.00
OTHER MORTGAGE PAYABLE (Old)	300,000.00

Total Long Term Liabilities 8,489,033.79

Total Liabilities 8,633,847.33

Equity

Retained Earnings	(1,916,109.71)
Current Net Income	58,590.77

Total Equity (1,857,518.94)

Total Liabilities & Equity 6,776,328.39

Janies Garden II

Budget Operating Report

As of May 31, 2023

	Month Ending 05/31/2023			01/01/2023 Through 05/31/2023			Year Ending 12/31/2023
	Actual	Budget	Budget Diff	Actual	Budget	Budget Diff	Budget
RENT INCOME							
512000 - APARTMENT RENT - TENANT	30,199.00	61,666.67	(31,467.67)	158,283.00	308,333.35	(150,050.35)	740,000.04
512100 - SUBSIDY REVENUE	31,956.00	0.00	31,956.00	158,304.00	0.00	158,304.00	0.00
TOTAL RENT INCOME	62,155.00	61,666.67	488.33	316,587.00	308,333.35	8,253.65	740,000.04
VACANCIES							
522000 - VACANCIES - TENANT	(306.00)	(2,000.00)	1,694.00	(2,885.00)	(8,000.00)	5,115.00	(18,000.00)
TOTAL VACANCIES	(306.00)	(2,000.00)	1,694.00	(2,885.00)	(8,000.00)	5,115.00	(18,000.00)
NET RENTAL INCOME	61,849.00	59,666.67	2,182.33	313,702.00	300,333.35	13,368.65	722,000.04
SERVICES INCOME							
533000 - TENANT APPLICATION FEE	0.00	0.00	0.00	30.00	0.00	30.00	0.00
TOTAL SERVICES INCOME	0.00	0.00	0.00	30.00	0.00	30.00	0.00
FINANCIAL INCOME							
541200 - INT INC - RESERVES & ESCROWS	997.32	0.00	997.32	3,504.74	0.00	3,504.74	0.00
541400 - INT INC - OPERATING RESERVE	355.44	0.00	355.44	1,314.73	0.00	1,314.73	0.00
541500 - INT INC - DEBT SERVICE RESERVE	636.51	0.00	636.51	2,309.33	0.00	2,309.33	0.00
TOTAL FINANCIAL INCOME	1,989.27	0.00	1,989.27	7,128.80	0.00	7,128.80	0.00
OTHER INCOME							
592500 - LATE CHARGES	1,100.00	455.00	645.00	4,545.00	2,275.00	2,270.00	5,464.00
593000 - RETURNED CHECKS CHARGES	0.00	0.00	0.00	50.00	0.00	50.00	0.00
593900 - DAMAGES	0.00	100.00	(100.00)	794.00	500.00	294.00	1,200.00
594000 - PET FEE	50.00	0.00	50.00	300.00	0.00	300.00	0.00
TOTAL OTHER INCOME	1,150.00	555.00	595.00	5,689.00	2,775.00	2,914.00	6,664.00
TOTAL INCOME	64,988.27	60,221.67	4,766.60	326,549.80	303,108.35	23,441.45	728,664.04
TOTAL CORPORATE EXPENSES							
RENTING EXPENSES							
621000 - ADVERTISING	0.00	50.00	50.00	609.84	250.00	(359.84)	500.00
622500 - CREDIT REPORTS	0.00	29.00	29.00	0.00	145.00	145.00	350.00
624500 - INSPECTION FEES	1,000.00	150.00	(850.00)	1,000.00	420.00	(580.00)	520.00
625500 - EVICTION EXPENSE	0.00	332.00	332.00	165.00	1,660.00	1,495.00	3,996.00
TOTAL RENTING EXPENSES	1,000.00	561.00	(439.00)	1,774.84	2,475.00	700.16	5,366.00
ADMINISTRATIVE EXPENSES							
631000 - OFFICE PAYROLL	1,934.90	2,616.00	681.10	6,742.79	9,596.00	2,853.21	23,507.00
631100 - OFFICE EXPENSE	132.98	333.00	200.02	605.84	2,065.00	1,459.16	4,802.00
631111 - BANK CHARGES	0.00	65.00	65.00	356.14	345.00	(11.14)	800.00
631500 - OFFICE EQUIPMENT EXPENSE	0.00	25.00	25.00	0.00	125.00	125.00	297.00
631502 - OFFICE/COMPUTER - SERVICES	615.28	0.00	(615.28)	615.28	490.00	(125.28)	1,960.00
632000 - MANAGEMENT FEES	3,359.64	3,475.00	115.36	18,548.71	17,375.00	(1,173.71)	41,700.00
632500 - ANSWERING SERVICE	0.00	32.00	32.00	358.40	160.00	(198.40)	381.00
633000 - SITE MANAGER'S PAYROLL EXPENSE	3,666.00	1,616.00	(2,050.00)	8,260.76	6,048.00	(2,212.76)	14,813.00
635000 - AUDIT EXPENSE	0.00	0.00	0.00	6,500.00	2,500.00	(4,000.00)	10,000.00
635300 - ALLOC. CENTRALIZED COMPLIANCE COSTS	0.00	0.00	0.00	575.28	602.00	26.72	2,408.00
635400 - SOFTWARE LICENSE EXPENSE	64.26	0.00	(64.26)	4,127.28	4,200.00	72.72	4,200.00
636000 - TELEPHONE	224.80	210.25	(14.55)	1,146.90	1,051.25	(95.65)	2,523.00
636500 - CABLE TV / INTERNET EXPENSE	93.30	102.00	8.70	476.50	510.00	33.50	1,220.00
637000 - BAD DEBT EXPENSE	0.00	500.00	500.00	0.00	2,500.00	2,500.00	6,000.00
637600 - SOCIAL SERVICE SUPPLIES	143.39	83.00	(60.39)	535.39	415.00	(120.39)	1,000.00
637604 - SOCIAL SERVICE EXPENSE - 3rd Party	2,274.09	2,250.00	(24.09)	7,757.09	11,250.00	3,492.91	27,000.00
638400 - TRAINING EXPENSE	0.00	310.59	310.59	1,761.81	717.75	(1,044.06)	1,425.19
638500 - TRAVEL EXPENSE	0.00	75.04	75.04	0.00	375.20	375.20	900.00
639000 - MISC ADMINISTRATIVE EXPENSE	138.75	300.00	161.25	138.75	1,500.00	1,361.25	3,600.00
Total ADMINISTRATIVE EXPENSES	12,647.39	11,992.88	(654.51)	58,506.92	61,825.20	3,318.28	148,536.19
OPERATING EXPENSE							
641900 - UNIFORMS EXPENSE	0.00	50.00	50.00	0.00	250.00	250.00	500.00
643000 - MAINTENANCE PAYROLL	1,781.16	4,941.00	3,159.84	10,331.18	18,121.00	7,789.82	44,367.00
643100 - JANITOR SUPPLIES	126.14	250.00	123.86	466.24	1,050.00	583.76	2,000.00
645000 - ELECTRICITY	(107.96)	500.00	607.96	1,406.35	2,500.00	1,093.65	6,000.00
645050 - ELECTRICITY - Vacant Unit	0.00	0.00	0.00	604.39	0.00	(604.39)	0.00
645051 - ELECTRICITY - Vacant Unit Recovery	0.00	0.00	0.00	(798.18)	0.00	798.18	0.00
645100 - WATER	2,618.53	2,500.00	(118.53)	13,804.19	12,500.00	(1,304.19)	30,000.00
645300 - SEWER	4,210.58	4,083.00	(127.58)	26,386.58	20,415.00	(5,971.58)	49,000.00
645500 - UTILITY PROCESSING / COMMISSIONS	0.00	70.00	70.00	261.12	350.00	88.88	840.00
645551 - Vacant Unit Recovery Fees	0.00	0.00	0.00	20.09	0.00	(20.09)	0.00
646000 - EXTERMINATING	0.00	250.00	250.00	918.00	1,250.00	332.00	3,000.00
647000 - GARBAGE & RUBBISH REMOVAL	787.78	833.00	45.22	4,044.98	4,165.00	120.02	10,000.00
647100 - FIRE SERVICE FEE / REPAIRS	551.50	933.00	381.50	6,928.43	4,665.00	(2,263.43)	11,200.00
649000 - MISC OPERATING EXPENSE	0.00	83.00	83.00	0.00	415.00	415.00	1,000.00

Janies Garden II

Budget Operating Report

As of May 31, 2023

	Month Ending 05/31/2023			01/01/2023 Through 05/31/2023			Year Ending 12/31/2023
	Actual	Budget	Budget Diff	Actual	Budget	Budget Diff	Budget
TOTAL OPERATING EXPENSE	9,967.73	14,493.00	4,525.27	64,373.37	65,681.00	1,307.63	157,907.00
MAINTENANCE EXPENSE							
650500 - PROTECTION/SECURITY COSTS	0.00	83.00	83.00	0.00	415.00	415.00	1,000.00
652000 - GROUNDS	0.00	0.00	0.00	400.00	0.00	(400.00)	0.00
652001 - GROUNDS - Supplies	0.00	0.00	0.00	0.00	1,000.00	1,000.00	1,000.00
652002 - GROUNDS - Contract	1,350.00	1,498.50	148.50	6,950.00	7,492.50	542.50	18,000.00
653000 - EXTERIOR PAINTING / REPAIRS	0.00	1,013.00	1,013.00	3,545.85	3,565.00	19.15	6,906.00
653500 - CLEANING EXPENSE	0.00	40.00	40.00	585.00	200.00	(385.00)	480.00
654100 - REPAIRS - APPLIANCES	140.73	250.50	109.77	1,215.70	1,252.50	36.80	2,999.75
654200 - REPAIRS - CARPET & FLOORS	0.00	250.00	250.00	250.00	1,060.00	810.00	2,000.00
654300 - REPAIRS - CARPENTRY	271.63	595.00	323.37	962.63	2,737.00	1,774.37	5,000.00
654307 - REPAIRS - Hardware	0.00	0.00	0.00	10.90	0.00	(10.90)	0.00
654400 - REPAIRS - ELECTRICAL	437.54	300.00	(137.54)	2,772.45	1,402.00	(1,370.45)	3,400.00
654600 - REPAIRS - PLUMBING	352.86	300.00	(52.86)	3,244.94	2,400.00	(844.94)	4,602.00
654800 - SERVICE CONTRACTS	0.00	0.00	0.00	351.55	0.00	(351.55)	0.00
655100 - REPAIRS - HVAC	2,812.76	787.50	(2,025.26)	7,197.33	4,183.50	(3,013.83)	9,000.00
656000 - DECORATING EXPENSE	942.44	715.92	(226.52)	3,813.49	2,382.60	(1,430.89)	5,000.04
657000 - MOTOR VEHICLE REPAIRS	0.00	100.00	100.00	0.00	500.00	500.00	1,200.00
658000 - MAIN EQUIPMENT REPAIR	0.00	42.00	42.00	0.00	210.00	210.00	500.00
658500 - SMALL TOOLS EXPENSE	4.11	42.00	37.89	158.42	252.00	93.58	500.00
659000 - MISC MAINTENANCE EXPENSE	0.00	83.00	83.00	75.00	415.00	340.00	1,000.00
TOTAL MAINTENANCE EXPENSE	6,312.07	6,100.42	(211.65)	31,533.26	29,467.10	(2,066.16)	62,587.79
INTEREST EXPENSE							
682000 - 1ST MORTGAGE INTEREST	10,210.41	10,241.00	30.59	55,698.13	51,205.00	(4,493.13)	122,892.00
TOTAL INTEREST EXPENSE	10,210.41	10,241.00	30.59	55,698.13	51,205.00	(4,493.13)	122,892.00
TAXES & INSURANCE							
671000 - TAXES - REAL ESTATE	0.00	0.00	0.00	0.00	0.00	0.00	32,100.00
671100 - PAYROLL TAXES	538.11	709.00	170.89	2,002.92	3,383.00	1,380.08	7,172.00
672000 - INSURANCE EXPENSE	0.00	0.00	0.00	38,826.40	50,000.00	11,173.60	120,400.00
672100 - HEALTH INSURANCE	897.42	1,000.00	102.58	2,315.24	5,000.00	2,684.76	12,000.00
672200 - WORKERS COMP INSURANCE	86.64	205.00	118.36	397.48	757.00	359.52	1,852.00
672300 - LITIGATION SETTLEMENT	0.00	167.00	167.00	84.00	835.00	751.00	2,000.00
TOTAL TAXES & INSURANCE	1,522.17	2,081.00	558.83	43,626.04	59,975.00	16,348.96	175,524.00
OTHER EXPENSES							
687000 - AGENCY SERVICE FEE	297.71	325.00	27.29	1,494.16	1,625.00	130.84	3,900.00
687500 - TRUSTEE FEES	406.33	408.00	1.67	2,031.65	2,041.00	9.35	4,900.00
TOTAL OTHER EXPENSES	704.04	733.00	28.96	3,525.81	3,666.00	140.19	8,800.00
EQUIPMENT PURCHASES							
721101 - Kitchen Appliances	0.00	600.00	600.00	1,713.31	3,600.00	1,886.69	9,000.00
721102 - Flooring: Carpet & Tile	332.39	1,000.00	667.61	2,188.85	5,000.00	2,811.15	12,000.00
721105 - Water Heaters	0.00	0.00	0.00	0.00	500.00	500.00	1,000.00
721106 - HVAC Equipment	216.00	1,300.00	1,084.00	4,292.92	6,500.00	2,207.08	13,200.00
721109 - Siding / Bldg Ext Repairs	0.00	0.00	0.00	0.00	60,000.00	60,000.00	60,000.00
721111 - System Upgrades	0.00	2,000.00	2,000.00	0.00	8,000.00	8,000.00	20,000.00
721112 - Doors & Windows (Exterior)	725.58	0.00	(725.58)	725.58	1,100.00	374.42	1,650.00
TOTAL EQUIPMENT PURCHASES	1,273.97	4,900.00	3,626.03	8,920.66	84,700.00	75,779.34	116,850.00
TOTAL CORPORATE EXPENSES	43,637.78	51,102.30	7,464.52	267,959.03	358,994.30	91,035.27	798,462.98
NET PROFIT OR LOSS	21,350.49	9,119.37	12,231.12	58,590.77	(55,885.95)	114,476.72	(69,798.94)
NON-OPERATING EXPENSES							
790100 - R/E TAXE ESCROW DEPOSITS	2,666.67	2,675.00	8.33	13,333.35	13,375.00	41.65	32,100.00
790101 - R/E TAXE ESCROW WITHDRAWALS	0.00	0.00	0.00	0.00	0.00	0.00	(32,100.00)
790200 - PROPERTY INSURANCE ESC DEP	16,833.34	9,950.00	(6,883.34)	80,666.69	49,750.00	(30,916.69)	119,400.00
790201 - PROPERTY INS ESC WITHDRAWALS	0.00	0.00	0.00	(38,826.40)	(50,000.00)	(11,173.60)	(119,400.00)
791000 - PROV FOR REPLACEMENTS	1,700.00	1,700.00	0.00	8,500.00	8,500.00	0.00	20,400.00
791100 - RFR REIMBURSEMENTS	0.00	0.00	0.00	0.00	0.00	0.00	(116,850.00)
793000 - PROV FOR MORT PRIN AMORT	2,500.00	2,083.00	(417.00)	10,000.01	10,415.00	414.99	25,000.00
TOTAL NON-OPERATING EXPENSES	23,700.01	16,408.00	(7,292.01)	73,673.65	32,040.00	(41,633.65)	(71,450.00)
NET CASH (+) / DEF (-)	(2,349.52)	(7,288.63)	4,939.11	(15,082.88)	(87,925.95)	72,843.07	1,651.06

Janies Garden III
Balance Sheet
May 31, 2023

Assets

Current Assets

Cash

PETTY CASH	400.00
CASH IN BANK GENERAL	5,749.11
CASH IN BANK- RECONCILIATION	(591.00)
CASH IN BANK - DEVELOPMENT	129,949.18
CASH IN BANK - SECURITY DEPOSITS	51,684.09

Total Cash	187,191.38
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Accounts Receivable

A/R - RESIDENTS	17,485.64
A/R - RESIDENTS - ACC UNITS	2.00
Voucher / PBV - Suspense	(4,568.00)
A/R - PBV SUBSIDY	945.00
A/R - VOUCHER SUBSIDY	2,406.00
A/R - ACC SUBSIDY	15,148.65
DUE FROM PARTNERS	100.00
DUE TO/FROM-OTHERS (OPERATIONS)	12,305.08
ALLOWANCE FOR DOUBTFUL ACCOUNTS	(8,909.24)

Total Accounts Receivable	34,915.13
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Deposits & Escrows

REAL ESTATE TAX ESCROW	19,615.50
PROPERTY & LIABILITY INSURANCE ESCROW	90,282.73
RESERVE FOR REPLACEMENTS	111,053.32
ESCROWS - OTHER	278,772.16
OPERATING RESERVE FUND	25,058.61
AFFORDABILITY RESERVE	146,923.97

Total Deposits & Escrows	671,706.29
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Other Current Assets

PREPAID PROPERTY INSURANCE	28,239.00
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Total Other Current Assets	28,239.00
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Total Current Assets	922,051.80
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Fixed Assets

LAND	550,000.00
BUILDINGS	10,961,370.79
MISC FIXED ASSETS	10,861.00

Depreciation & Amortization

ACC DEPR BUILDINGS	(3,068,654.00)
ACC DEPR - MISC FIXED ASSETS	(10,235.00)

Total Depreciation & Amortization	(3,078,889.00)
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Total Fixed Assets	8,443,342.79
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Other Assets

DEPOSITS - RECEIVABLE	3,204.64
START-UP COSTS	46,000.00
LIHTC FEE	349,236.00
ACCUM. AMORT. - LIHTC MONITORING FEE	(155,598.00)
ACC - AMORT FINANCING FEES (Old)	(39,803.00)

Janies Garden III

Balance Sheet

May 31, 2023

RAR ADJ - ACCUM AMORTIZATION	(46,000.00)
Total Other Assets	<u>157,039.64</u>
Total Assets	<u><u>9,522,434.23</u></u>

Janies Garden III
Balance Sheet
May 31, 2023

Liabilities & Equity

Liabilities

Current Liabilities

ACCOUNTS PAYABLE	97,327.22
ACCOUNTS PAYABLE - OTHER	(294,419.00)
ACTS PAY - RES EXCESS HSING ASST P	58.00
ACCRUED 1ST MORTGAGE INTEREST PAYABLE	797,253.32
ACCRUED INTEREST PAYABLE - 2ND MORTG.	6,528.00
ACCRUED EXPENSE	7,016.00
ACCRUED PARTNERSHIP EXPENSES	3,582.16
SECURITY DEPOSIT REFUNDS IN TRANSIT	1,406.24

Total Current Liabilities	618,751.94
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Other Current Liabilities

SECURITY DEPOSIT LIABILITY	49,386.00
SECURITY DEP INT LIABILITY	190.02
PREPAID RENTS	14,258.11

Total Other Current Liabilities	63,834.13
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Long Term Liabilities

DEFERRED FINANCING FEES	(134,334.82)
1ST MORTGAGE PAYABLE	1,236,910.41
2ND MORTGAGE PAYABLE	2,815,931.00

Total Long Term Liabilities	3,918,506.59
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Total Liabilities	4,601,092.66
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Equity

Retained Earnings	4,728,030.12
Current Net Income	193,311.45

Total Equity	4,921,341.57
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Total Liabilities & Equity	9,522,434.23
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Janies Garden III Budget Operating Report As of May 31, 2023

	Month Ending 05/31/2023			01/01/2023 Through 05/31/2023			Year Ending 12/31/2023
	Actual	Budget	Budget Diff	Actual	Budget	Budget Diff	Budget
RENT INCOME							
512000 - APARTMENT RENT - TENANT	36,822.00	80,000.00	(43,178.00)	188,078.00	400,000.00	(211,922.00)	960,000.00
512001 - APARTMENT RENT- TENANT ACC ONLY	1,232.00	0.00	1,232.00	14,373.00	0.00	14,373.00	0.00
512100 - SUBSIDY REVENUE	59,356.00	0.00	59,356.00	286,067.00	0.00	286,067.00	0.00
TOTAL RENT INCOME	97,410.00	80,000.00	17,410.00	488,518.00	400,000.00	88,518.00	960,000.00
VACANCIES							
522000 - VACANCIES - TENANT	(5,063.00)	(2,000.00)	(3,063.00)	(30,687.00)	(10,000.00)	(20,687.00)	(24,000.00)
TOTAL VACANCIES	(5,063.00)	(2,000.00)	(3,063.00)	(30,687.00)	(10,000.00)	(20,687.00)	(24,000.00)
NET RENTAL INCOME	92,347.00	78,000.00	14,347.00	457,831.00	390,000.00	67,831.00	936,000.00
SERVICES INCOME							
531000 - COIN OPERATIONS	0.00	42.00	(42.00)	0.00	210.00	(210.00)	500.00
533000 - TENANT APPLICATION FEE	0.00	42.00	(42.00)	150.00	210.00	(60.00)	500.00
TOTAL SERVICES INCOME	0.00	84.00	(84.00)	150.00	420.00	(270.00)	1,000.00
FINANCIAL INCOME							
541300 - INT INC - AFFORDABILITY RESERVE	23.03	0.00	23.03	70.41	0.00	70.41	0.00
541400 - INT INC - OPERATING RESERVE	87.66	0.00	87.66	348.73	0.00	348.73	0.00
TOTAL FINANCIAL INCOME	110.69	0.00	110.69	419.14	0.00	419.14	0.00
OTHER INCOME							
591000 - SECURITY DEPOSIT FORFEITURE	0.00	0.00	0.00	788.20	0.00	788.20	0.00
592500 - LATE CHARGES	1,250.00	350.00	900.00	5,055.00	1,750.00	3,305.00	4,200.00
593600 - LEGAL INCOME	0.00	0.00	0.00	766.00	0.00	766.00	0.00
593900 - DAMAGES	100.00	167.00	(67.00)	1,668.00	835.00	833.00	2,000.00
598200 - RENT CONCESSIONS	(397.00)	0.00	(397.00)	(397.00)	0.00	(397.00)	0.00
TOTAL OTHER INCOME	953.00	517.00	436.00	7,880.20	2,585.00	5,295.20	6,200.00
TOTAL INCOME	93,410.69	78,601.00	14,809.69	466,280.34	393,005.00	73,275.34	943,200.00
TOTAL CORPORATE EXPENSES							
RENTING EXPENSES							
621000 - ADVERTISING	0.00	63.00	63.00	636.36	315.00	(321.36)	754.50
622500 - CREDIT REPORTS	0.00	42.00	42.00	51.30	210.00	158.70	506.00
624500 - INSPECTION FEES	0.00	83.00	83.00	0.00	415.00	415.00	1,000.00
625500 - EVICTION EXPENSE	0.00	501.00	501.00	90.00	2,505.00	2,415.00	6,000.00
TOTAL RENTING EXPENSES	0.00	689.00	689.00	777.66	3,445.00	2,667.34	8,260.50
ADMINISTRATIVE EXPENSES							
631000 - OFFICE PAYROLL	2,043.21	2,790.00	746.79	7,116.45	10,226.00	3,109.55	25,046.00
631100 - OFFICE EXPENSE	136.63	466.00	329.37	631.13	2,330.00	1,698.87	5,596.00
631111 - BANK CHARGES	0.00	50.00	50.00	209.34	650.00	440.66	1,000.00
631500 - OFFICE EQUIPMENT EXPENSE	0.00	50.00	50.00	0.00	154.00	154.00	500.00
631502 - OFFICE/COMPUTER - SERVICES	651.47	0.00	(651.47)	651.47	875.00	223.53	3,500.00
632000 - MANAGEMENT FEES	7,137.25	4,600.00	(2,537.25)	31,599.47	23,000.00	(8,599.47)	55,200.00
632500 - ANSWERING SERVICE	0.00	29.00	29.00	0.00	145.00	145.00	350.00
633000 - SITE MANAGER'S PAYROLL EXPENSE	3,910.40	1,724.00	(2,186.40)	7,811.46	6,448.00	(1,363.46)	15,792.00
634200 - TAX CREDIT COMPLIANCE/MONITORING FEE	0.00	0.00	0.00	0.00	508.00	508.00	2,030.00
635000 - AUDIT EXPENSE	0.00	0.00	0.00	6,500.00	2,500.00	(4,000.00)	10,000.00
635300 - ALLOC. CENTRALIZED COMPLIANCE COSTS	0.00	0.00	0.00	609.12	610.00	0.88	2,440.00
635400 - SOFTWARE LICENSE EXPENSE	38.55	0.00	(38.55)	4,374.24	4,500.00	125.76	4,500.00
636000 - TELEPHONE	239.76	183.00	(56.76)	1,223.32	915.00	(308.32)	2,200.00
636500 - CABLE TV / INTERNET EXPENSE	318.52	313.20	(5.32)	1,582.79	1,566.00	(16.79)	3,758.40
637000 - BAD DEBT EXPENSE	0.00	2,000.00	2,000.00	1,165.33	10,000.00	8,834.67	23,996.00
637600 - SOCIAL SERVICE SUPPLIES	151.84	72.00	(79.84)	618.84	575.00	(43.84)	1,002.00
637604 - SOCIAL SERVICE EXPENSE - 3rd Party	2,420.08	2,373.00	(47.08)	8,268.08	11,865.00	3,596.92	28,476.00
638400 - TRAINING EXPENSE	0.00	250.00	250.00	1,822.04	1,250.00	(572.04)	3,000.00
638500 - TRAVEL EXPENSE	0.00	250.00	250.00	0.00	1,250.00	1,250.00	3,000.00
639000 - MISC ADMINISTRATIVE EXPENSE	138.75	133.00	(5.75)	138.75	665.00	526.25	1,600.00
Total ADMINISTRATIVE EXPENSES	17,186.46	15,283.20	(1,903.26)	74,321.83	80,032.00	5,710.17	192,986.40
OPERATING EXPENSE							
641900 - UNIFORMS EXPENSE	0.00	33.00	33.00	0.00	165.00	165.00	400.00
643000 - MAINTENANCE PAYROLL	1,885.78	5,196.00	3,310.22	11,566.07	19,048.00	7,481.93	46,654.00
643100 - JANITOR SUPPLIES	126.14	166.00	39.86	1,004.84	830.00	(174.84)	1,997.00
645000 - ELECTRICITY	1,094.91	986.00	(108.91)	5,067.84	4,930.00	(137.84)	11,840.00
645050 - ELECTRICITY - Vacant Unit	270.74	0.00	(270.74)	2,518.55	0.00	(2,518.55)	0.00
645051 - ELECTRICITY - Vacant Unit Recovery	(183.35)	0.00	183.35	(677.35)	0.00	677.35	0.00
645100 - WATER	3,093.38	2,700.00	(393.38)	15,157.86	13,500.00	(1,657.86)	32,400.00
645300 - SEWER	4,671.65	4,000.00	(671.65)	22,753.63	20,000.00	(2,753.63)	48,000.00
645500 - UTILITY PROCESSING / COMMISSIONS	0.00	72.00	72.00	276.48	360.00	83.52	864.00
645551 - Vacant Unit Recovery Fees	(8.50)	0.00	8.50	128.99	0.00	(128.99)	0.00

Janies Garden III Budget Operating Report As of May 31, 2023

	Month Ending 05/31/2023			01/01/2023 Through 05/31/2023			Year Ending 12/31/2023
	Actual	Budget	Budget Diff	Actual	Budget	Budget Diff	Budget
646000 - EXTERMINATING	0.00	500.00	500.00	810.00	2,500.00	1,690.00	6,000.00
647000 - GARBAGE & RUBBISH REMOVAL	401.82	999.60	597.78	690.10	4,998.00	4,307.90	12,000.00
647050 - GARBAGE & RUBBISH REMOVAL - Vacant Unit	442.09	0.00	(442.09)	2,517.41	0.00	(2,517.41)	0.00
647100 - FIRE SERVICE FEE / REPAIRS	582.13	121.55	(460.58)	7,457.32	2,752.75	(4,704.57)	10,000.00
649000 - MISC OPERATING EXPENSE	0.00	250.00	250.00	1,060.00	1,250.00	190.00	3,000.00
TOTAL OPERATING EXPENSE	12,376.79	15,024.15	2,647.36	70,331.74	70,333.75	2.01	173,155.00
MAINTENANCE EXPENSE							
650500 - PROTECTION/SECURITY COSTS	0.00	83.00	83.00	0.00	415.00	415.00	996.00
652000 - GROUNDS	0.00	0.00	0.00	400.00	0.00	(400.00)	0.00
652001 - GROUNDS - Supplies	0.00	0.00	0.00	1,750.00	3,500.00	1,750.00	3,500.00
652002 - GROUNDS - Contract	1,415.00	1,570.65	155.65	7,275.00	8,963.25	1,688.25	20,499.80
653000 - EXTERIOR PAINTING / REPAIRS	0.00	150.00	150.00	1,835.12	750.00	(1,085.12)	1,800.00
653500 - CLEANING EXPENSE	850.00	1,000.00	150.00	4,150.00	3,000.00	(1,150.00)	5,000.00
654100 - REPAIRS - APPLIANCES	149.13	300.00	150.87	1,776.43	1,500.00	(276.43)	3,750.00
654200 - REPAIRS - CARPET & FLOORS	0.00	150.00	150.00	0.00	750.00	750.00	1,800.00
654300 - REPAIRS - CARPENTRY	282.20	450.00	167.80	1,430.23	2,170.00	739.77	5,000.00
654307 - REPAIRS - Hardware	0.00	0.00	0.00	10.88	0.00	(10.88)	0.00
654400 - REPAIRS - ELECTRICAL	155.91	683.00	527.09	967.24	2,465.00	1,497.76	4,996.00
654600 - REPAIRS - PLUMBING	246.66	550.00	303.34	3,542.75	2,750.00	(792.75)	6,000.00
654700 - REPAIRS - PROP DAMAGE/CLAIMS	0.00	0.00	0.00	2,126.93	0.00	(2,126.93)	0.00
654800 - SERVICE CONTRACTS	0.00	150.00	150.00	430.27	750.00	319.73	1,800.00
655100 - REPAIRS - HVAC	1,633.03	670.00	(963.03)	6,619.61	3,350.00	(3,269.61)	8,000.00
656000 - DECORATING EXPENSE	945.57	366.00	(579.57)	6,231.83	3,294.00	(2,937.83)	8,800.00
657000 - MOTOR VEHICLE REPAIRS	0.00	125.00	125.00	0.00	625.00	625.00	1,506.00
658000 - MAIN EQUIPMENT REPAIR	0.00	0.00	0.00	0.00	500.00	500.00	1,000.00
658500 - SMALL TOOLS EXPENSE	4.12	730.00	725.88	158.51	1,150.00	991.49	1,300.00
659000 - MISC MAINTENANCE EXPENSE	0.00	200.00	200.00	75.00	1,000.00	925.00	2,000.00
TOTAL MAINTENANCE EXPENSE	5,681.62	7,177.65	1,496.03	38,779.80	36,932.25	(1,847.55)	77,747.80
INTEREST EXPENSE							
682000 - 1ST MORTGAGE INTEREST	6,293.82	6,294.00	0.18	31,739.79	31,741.00	1.21	76,473.00
TOTAL INTEREST EXPENSE	6,293.82	6,294.00	0.18	31,739.79	31,741.00	1.21	76,473.00
TAXES & INSURANCE							
671000 - TAXES - REAL ESTATE	0.00	0.00	0.00	0.00	0.00	0.00	33,000.00
671100 - PAYROLL TAXES	571.23	753.00	181.77	2,129.06	3,585.00	1,455.94	7,597.00
672000 - INSURANCE EXPENSE	0.00	0.00	0.00	41,110.30	53,000.00	11,889.70	140,600.00
672100 - HEALTH INSURANCE	953.02	1,000.00	46.98	2,456.96	5,000.00	2,543.04	12,000.00
672200 - WORKERS COMP INSURANCE	92.44	215.00	122.56	425.41	787.00	361.59	1,929.00
TOTAL TAXES & INSURANCE	1,616.69	1,968.00	351.31	46,121.73	62,372.00	16,250.27	195,126.00
EQUIPMENT PURCHASES							
721101 - Kitchen Appliances	0.00	0.00	0.00	237.95	1,500.00	1,262.05	6,500.00
721102 - Flooring: Carpet & Tile	3,249.69	0.00	(3,249.69)	3,249.69	2,000.00	(1,249.69)	2,000.00
721105 - Water Heaters	0.00	0.00	0.00	0.00	500.00	500.00	1,000.00
721106 - HVAC Equipment	216.00	2,000.00	1,784.00	4,611.54	3,500.00	(1,111.54)	7,200.00
721109 - Siding / Bldg Ext Repairs	0.00	0.00	0.00	2,074.96	20,000.00	17,925.04	30,000.00
721111 - System Upgrades	0.00	0.00	0.00	0.00	10,000.00	10,000.00	20,000.00
721112 - Doors & Wndws (Exterior)	722.20	0.00	(722.20)	722.20	1,300.00	577.80	1,300.00
TOTAL EQUIPMENT PURCHASES	4,187.89	2,000.00	(2,187.89)	10,896.34	38,800.00	27,903.66	68,000.00
TOTAL CORPORATE EXPENSES	47,343.27	48,436.00	1,092.73	272,968.89	323,656.00	50,687.11	791,748.70
NET PROFIT OR LOSS	46,067.42	30,165.00	15,902.42	193,311.45	69,349.00	123,962.45	151,451.30
NON-OPERATING EXPENSES							
790100 - R/E TAXE ESCROW DEPOSITS	2,802.21	2,750.00	(52.21)	15,999.73	13,750.00	(2,249.73)	33,000.00
790101 - R/E TAXE ESCROW WITHDRAWALS	0.00	0.00	0.00	0.00	0.00	0.00	(33,000.00)
790200 - PROPERTY INSURANCE ESC DEP	10,401.91	11,625.00	1,223.09	71,800.98	58,125.00	(13,675.98)	139,500.00
790201 - PROPERTY INS ESC WITHDRAWALS	0.00	0.00	0.00	(41,110.30)	(53,000.00)	(11,889.70)	(139,500.00)
791000 - PROV FOR REPLACEMENTS	2,086.69	2,087.00	0.31	10,433.45	10,435.00	1.55	25,230.00
793000 - PROV FOR MORT PRIN AMORT	1,217.77	1,218.00	0.23	5,818.16	5,819.00	0.84	13,667.00
TOTAL NON-OPERATING EXPENSES	16,508.58	17,680.00	1,171.42	62,942.02	35,129.00	(27,813.02)	38,897.00
NET CASH (+) / DEF (-)	29,558.84	12,485.00	17,073.84	130,369.43	34,220.00	96,149.43	112,554.30



Sarasota Housing Authority (SHA)
269 South Osprey Avenue
Sarasota, FL 34236

Development Committee
Zoom Meeting
April 11, 2023
4:30 P.M.

I. CALL TO ORDER: The Development Committee meeting was called to order at 4:30 pm.

II. ROLL CALL

Commissioners Present: Jack Meredith, Duane Finger, Ernestine Taylor, Deborah Sargent, Mark Vengroff and John Colón (in at 4:39 pm)

Committee Members Not Present: N/A

SHA Personnel/Development Partners/General Attendees: William Russell, Andrea Keddell, Rick Toney, Joe Chambers, City Commissioner Jen Ahearn-Koch, Valerie Buchand, Agnes Kirkland, Chris Gallagher (Hoyt Architects) and Jake Zunamon (Smith Henzy)

III. MCCOWN TOWER

- Mr. Chambers provided an update on redevelopment progress. Painting and roof work has begun. Phase II should be nearing completion around 6/1/23.
 - Ms. Buchand reported that she received information that Unit 1005 is having A/C issues and it's one of the redeveloped units. Mr. Chambers will look into this.
 - Mr. Gallagher asked for clarification about the paint color for the sign on the building and canopy. General consensus was to leave it as is but Mr. Gallagher will provide some color options for review.

IV. CYPRESS SQUARE (COURTS-PHASE I)

- Mr. Chambers provided an update on redevelopment progress. There have been some GC staffing changes. Still having issues getting concrete. The 1st build-out is on schedule to be completed by the end of August 2023 with final completion towards the end of the year, December 2023. The leasing office is on track to be done early on, which will assist with lease up. An email address is being set up for interested parties to be put on a list.
 - Ms. Buchand inquired if the Empowerment Center is going to be in the 1st Phase or 2nd Phase? Mr. Chambers responded that the layout for 1st Phase is set but if funds are identified for an Empowerment Center, there are places to put it. However, he reminded all that it would not be something that can be paid for with tax credits or conventional financing.

V. LOFTS ON LEMON (PHASE II)

- Mr. Jack Zunamon, with the Smith Henzy Affordable Group, addressed the board on the upcoming FHFC RFA, with apps due May 2, that may be able to assist in funding. The RFA was updated to also allow for developments that require demolition and new construction. So now Amaryllis Phase III could potentially be able to apply as well.

- The Special Board meeting will be needed to get approval to move forward with an application for Lofts on Lemon Phase II (93 Highrise Units) and Amaryllis Park Place Phase III (120 Units/4 Story Building), with land left over for a possible Phase IV. There is a possibility of getting funding for up to \$10 Million to fill the gap funding needs. Originally, we were only going to be able to apply for \$8 Million.
- Commissioner Sargent inquired about when the Special Board meeting would be held. Mr. Russell responded that, since the applications are due on May 2nd, they're hoping to hold the board meeting next week, to allow time for putting together the application(s). Commissioner Sargent stated she would be out of town at a conference next week. It was brought up that if there's a physical quorum, Commissioner Sargent could attend via zoom. Mr. Russell reminded that the next Board Meeting isn't scheduled until May 10th so there's an urgency to hold the Special Board Meeting prior to the May 2nd application deadline.
 - It was decided to hold the meeting earlier, at 3:30 pm on April 19, to accommodate Commissioner Sargent's conference schedule. Commissioner Finger, Taylor, Meredith and Vengroff were all available to make the physical quorum.

VI. PROPOSAL FOR CITY ZONING FOR DOWNTOWN DENSITY BONUS

- Mr. Russell reintroduced the reason for the proposal needed for the city regarding the downtown density bonus and zoning codes. The proposal handout was re-shared and discussed. Mr. Russell would like to see a more aggressive proposal and that increased density needs to be earned and phased in. He also would like to discuss how to define "affordable" and what incomes are able to afford the developed units.
- The goal is to get the board's approval to bring this proposal to the city.
 - City Commissioner Jen Ahearn-Koch stated that the city defines attainable housing at 120% AMI and below. Mr. Russell looked up the figures and reported that the low-income threshold (80% of AMI) for a single person the income is \$48,350. A family of 2 has an income limit of \$55,250; a family of 3 is \$62,150; and a family of 4 is \$69,050. He states that new income limits should be coming out within the next week or so.
 - Mr. Russell provided the example that a family of 3 at 80% AMI, the rent that they could afford to pay is set at \$1,553. Commissioner Vengroff agreed that to receive any density bonus, rents should be set at 80% of AMI or below, but that a tier for the density bonus would be the way to go to bring in 60% - 80% range units.
 - It was further discussed that a tiered bonus structure would be best, allowing for more units to be built for developers willing to include units for lower income families.

VII. MISCELLANEOUS

- Ms. Buchand inquired about Janie's Garden and the fact that she's been told that new residents are being asked to clean their own apartments prior to moving in. Mr. Russell will look into this issue with IRM.

VIII. ADJOURNMENT

The Development Committee meeting was adjourned at 5:16 pm.



Sarasota Housing Authority (SHA)
269 South Osprey Avenue
Sarasota, FL 34236

Resident Interest Committee
Zoom Meeting
June 6, 2023
4:30 pm

- I. **CALL TO ORDER:** Commissioner Sargent called the Resident Interest Committee meeting to order at 4:35 p.m.

- II. **INVOCATION**

- III. **ROLL CALL**
Commissioners Present: Committee Chair Deborah Sargent, Commissioner Ernestine, Taylor and Commissioner Duane Finger
Resident Leaders: Valerie Buchand (Janie's Garden), Agnes Kirkland (McCown Tower) and Elena Andrews (Bertha Mitchell)
SHA Personnel: William Russell, Ken Waters, Wanda Lopez, Viktoriya Coblentz and Andrea Keddell
General Attendees: Rachel Johnson (Faces of HUD Housing Unity Project), Susan Brucklacher (Unitarian Church), Susan Ladwig (Unitarian Church), Sharron Howard, Doug Francis, Luther Nix, Kristin Burton, Ernie Fletcher, Kyera Lang (Demi) and Vincent Parker

- IV. **SHA PROGRAM UPDATES**
 - Mr. Russell reported that SHA should find out soon if we are receiving Disaster Funding for Lofts on Lemon II and the next phase of redevelopment for the Courts. Both Requests for Applications (RFAs) were submitted in May 2023.
 - Mr. Russell reported that he is planning to have a meeting set up with the Resident Council and SHA's development partner, Joe Chambers, to discuss future development plans sometime in the next week(s).
 - Cypress Square (Courts): Mr. Russell reports Cypress Square construction is moving along. The hope is for it to be completed by early next year. This will be an 84-unit development for low and very low-income families.
 - McCown Tower: Mr. Russell reports that redevelopment is nearing the end of the 2nd phase (25 Units) and then will start 3rd phase on the next 25 units.
 - Mr. Russell reported that SHA partnered with the Safe Children Coalition to get HUD vouchers for a new program, Fostering Youth to Independence (FYI), and was awarded 25 of the vouchers. The Safe Children Coalition will be referring 25 youths that will be aging out of foster care who will be in need of housing assistance as adults and they will also provide life skill training to these individuals.
 - SHA's new HCV Director, Jeremy White, was able to apply for 35 additional Homeless VASH Vouchers from the local Veteran's Association.

V. RESIDENT SERVICES UPDATES

Resident Services (SHA)

- Mr. Waters reported that SHA started its Summer Kick-Off this past Thursday as part of the 3 Book Rich Environment events that are held in the summer. There were 72 children at the event and many engaging activities and books for the children.
- Mr. Waters reported that SHA's Summer Enrichment Program began yesterday. There are 12 students participating with field trips, classes and reading recovery program with a local teacher.
 - Mr. Waters reported that the gains made by students participating in the summer reading program are evidenced by the students excelling in their reading during the following school year. Mr. Russell added that this Reading Recovery program is a key component to assuring students don't experience the "summer slide" and are able to maintain their reading skills over the summer.
- Mr. Waters reported on the 4H, I-Read program happening this weekend involving 6, middle school aged children. The students will be traveling to the University of Georgia.

Resident Services (Janie's Garden)

- No Updates.

VI. PROPERTY REPORTS

Towers / Annex Report

- Ms. Buchand introduced Luther Nix who spoke to the group about his impending eviction due to a fight he'd been in with another resident. He claims he'd been dealing with aggression from this neighbor for 3 years and was defending himself and trying to scare the resident away.
 - Further discussion took place regarding the specifics of this altercation and the residents' situation. Question was raised as to whether this eviction could be overturned or "cured" and what can be done to keep this 74-year-old man with a heart condition from being homeless? Mr. Russell responded that he could schedule a meeting with the resident advocates to discuss the specifics of this situation. He added that curables are often issued by the Housing Authority and it does not rush to evict residents.
 - Ms. Kirkland added that she'd never seen Mr. Nix bother anyone.
 - Commissioner Finger stated that perhaps there's a gap in services for good tenants that may be experiencing difficulties and inquired if Mr. Waters or the Resident Services staff have someone to work with residents that may have behavioral or cognitive issues to intervene with conflicts between elderly residents before it gets to an eviction situation?
 - ➔ Ms. Buchand interjected that the Resident Council dealt with residents and all their issues when they had the ROSS Grand but she feels the current staff pick and choose who they work with.
 - ➔ Ms. Johnson interjected that she's been told that staff at McCown and Section 8 need to show residents more respect and to treat residents as adults. She introduced a Section 8 recipient to address the committee.

- Commissioner Finger asked if his question could be addressed first.
- Ms. Kristin Burton continued on to explain and state her displeasure with how she was treated by her last casework and past Section 8 staff. She stated she was only able to get her voucher reinstated with the help of her Senate advocate and Ms. Johnson and asked Mr. Russell how he plans to address these communication issues. Mr. Russell began to respond but was muted.
- Ms. Sargent interjected asking for a response and agreeing that she has also experienced staff at Janie's Garden who are not responsive or respectful. Ms. Burton continued that SHA should have programs for people who are disabled or a social worker who can help people navigate the programs.
- Mr. Russell responded that he's heard the concerns but that it wouldn't be acceptable for him to discuss specifics of any residents' case in this public forum or with individuals not directly involved.
- Following additional statements from Ms. Burton and Commissioner Sargent of situations where their respective program staff were lacking in respect and responsiveness, Ms. Johnson introduced another case of a lease non-renewal by a private landlord that she's requesting be cured and several other cases that she'd like to discuss where people lost their housing.
- Back and forth discussion ensued. Ms. Johnson maintained that SHA needs to be responsive to the Resident Council and their requests for information and financial assistance. Mr. Russell responded that he has and will continue to meet with the Resident Council to discuss concerns. He reminded that at the start of this meeting he announced he was setting a meeting in the coming weeks to discuss development plans. He also addressed that he has always complied when the Resident Council has requested lists, policies or agreements but when requests are submitted as a "public record request" he's forced to follow our Board approved policies, which is what he shared with the Resident Council.
- Additional back and forth discussion took place between Ms. Johnson and Mr. Russell regarding specifics of the MOU being negotiated between SHA and the Resident Council. Mr. Russell explained that the Board tabled the MOU and that is what is holding it up from being signed but that funding has continued to be disbursed to the Council in the meantime. Ms. Johnson requested an immediate meeting so all of these issues can be resolved.
- Ms. Buchand addressed the committee about moving forward stating that the Council and SHA need to work together because there are residents that are suffering. Ms. Buchand confirmed that SHA has been paying the Resident Council stipends, occasional office/holiday/specialty items and trainings but listed all the additional cash revenues that should be coming to the Council and her displeasure with the displacement of the Resident Council from their current office to an office they feel is sub-par.

Janie's Garden

- Commissioner Sargent expressed her displeasure with Janie's Garden management above.

Orange, Courts and Bertha Mitchell (OCB)

- No Updates.

VII. MISC BUSINESS

- HUD NSPIRE Inspections - Commissioner Sargent asked Mr. Russell to provide information on this topic. She feels this is important information that should be provided to the whole board and stated she has a packet that can be printed up and provided to them. Mr. Russell responded that HUD is switching to NSPIRE but that McCown Tower has an upcoming inspection that will still be the UPCS inspection. Starting in July all public housing will be using the NSPIRE protocols. The biggest difference is the inspections will focus more on the units than the grounds and common areas. The Section 8 program will eventually be moving to an NSPIRE based protocol as well. Multi-family properties (i.e. McCown and Annex) will begin with NSPIRE protocols after October 1st.
- Ms. Johnson asked Mr. Russell for an update on what will be done in response to the situations addressed at this meeting with Mr. Vincent's non-renewal and Mr. Nix's eviction. Mr. Russell responded that with regard to Mr. Nix, there were 2 court hearings and a video of the assault. Ms. Johnson and Ms. Buchand maintain that Mr. Russell has the authority to stay the eviction.
 - Mr. Russell responded that he's unable to commit to overturning any court appointed eviction but that he would look into postponing the eviction and setting a follow up meeting. Ms. Buchand asked for Mr. Russell to provide the video to them at the follow-up meeting.
 - Additional discussion took place on the specifics of this case.

VIII. CLOSING PRAYER

IX. ADJOURNMENT

The Resident Interest Committee meeting was adjourned at 5:50 p.m.



Sarasota Housing Authority (SHA)
269 South Osprey Avenue
Sarasota, FL 34236

Administration and Finance Committee
Zoom Meeting
June 13, 2023
4:30 pm

- I. **CALL TO ORDER:** The Administration and Finance Committee meeting was called to order at 4:32 pm.
- II. **ROLL CALL:**
Commissioners Present: Commissioner Ernestine Taylor, Commissioner Duane Finger and Commissioner Deborah Sargent
SHA Staff: William Russell, Viktoriya Coblentz, Wanda Lopez, Rick Toney, Helen Blanc and Andrea Keddell
Other Attendees: Valerie Buchand
- III. **ADMISSIONS & CONTINUED OCCUPANCY PLAN (ACOP) REQUIRED UPDATES**
 - Mr. Russell provided the background information for the Housing Opportunity Through Modernization Act (HOTMA) housing legislation that was passed, which necessitated these updates.
 - Mr. Russell went over the handout of revisions to the ACOP, which governs the 100 units of public housing at the Bertha Mitchell property.
 - Commissioner Sargent reported CIS stands for Citizen Immigration Server in Section 8.2 Eligibility Criteria. (*Following the meeting, a further search found that CIS in the ACOP stands for Citizenship and Immigration Services.*) She also stated that SHA should be signed up for the Systematic Alien Verification for Entitlements (SAVE) service that allows federal, state, and local benefit-granting agencies to verify a benefit applicant's immigration status or naturalized/derived citizenship. Mr. Russell states he can check into this and that he believes our contractors have used it to look people up.
 - Commissioner Sargent inquired what the blue and red notations in the revision documents signify. It was explained that the different colors were due to edits being done by different people or at different times.
- IV. **HOUSING CHOICE VOUCHER (HCV) ADMIN PLAN REQUIRED UPDATES**
 - Mr. Russell provided an overview of the handout of revisions to the HCV Admin Plan.
 - Mr. Russell pointed out that they're looking to add the option of the CEO approving additional extensions past 120 days on a voucher issuance, due to the lack of affordable housing in the market and that often times voucher holders have a difficult time finding a suitable unit.
 - Commissioner Finger inquired about cases where a voucher holder may be waiting for construction of an available unit. Mr. Russell responded that this revision will allow him to extend the voucher to assist in those cases.

- Ms. Buchand inquired about instances where a case worker isn't responding in a timely manner to get the voucher holder into a place. Mr. Russell stated that would be factored into an extension request and that he'd need it brought to his attention by the participant or SHA staff. The voucher holder would need to submit the request for the extension.
- Ms. Buchand inquired if loans below 45% of a person's monthly adjusted income, does it ensure that a person has enough income to pay the rest of their bills? Mr. Russell pointed out that the revision outlines that the loan amount determination does take into consideration other bills and how the financing impacts the potential homeowner. This restriction will safeguard the potential homeowner from taking on too much of a financial burden.
- Mr. Russell explained that potential homeowners are allowed to go to any bank they choose if they find a better rate. However, there are often select banks that are familiar with underwriting a Section 8 mortgage and some banks won't underwrite a mortgage using Section 8 subsidy.

V. SHA CULTURE GUIDE (FORMER PERSONNEL POLICY) UPDATES

- Mr. Russell provided an overview of the handout of revisions to the Culture Guide.
- No additional concerns or questions were raised.

VI. ADJOURNMENT

- The Administration and Finance Committee meeting was adjourned at 5:04 pm.



Sarasota Housing Authority (SHA)
269 South Osprey Avenue
Sarasota, FL 34236

Development Committee
Zoom Meeting
June 15, 2023
4:30 P.M.

I. CALL TO ORDER: The Development Committee meeting was called to order at 4:30 pm.

II. ROLL CALL

Commissioners Present: Jack Meredith, Duane Finger, Ernestine Taylor, Mark Vengroff and John Colón (in at 4:40 pm)

Committee Members Not Present: N/A

SHA Personnel/Development Partners/General Attendees: William Russell, Andrea Keddell, Rick Toney and Joe Chambers

III. CYPRESS SQUARE (COURTS-PHASE I)

- Mr. Chambers provided an update on redevelopment progress. The final completion is estimated towards the end of the year, December 2023. An email address was set up for interested parties to be put on a list to receive an email when the site is ready for lease up. Lease up activities are approximately 90 days out.
- Commissioner Finger inquired if those residents that were or will be displaced from the current public housing in that area be allowed an opportunity to get a finished unit. Mr. Russell responded that this would definitely be an option and they could look into the possibility of utilizing some of these units for relocation purposes for the next phase of this development. He will look into this further for the remaining families in the Courts.
- Mr. Russell reported that the first draw was submitted for Cypress Square. SHA is working to utilize non-loan funds that don't carry high interest rates.

IV. LOFTS ON LEMON (PHASE II)

- Mr. Chambers reported that Lofts on Lemon Phase II (93 Highrise Units) was approved for \$10.8 Million in funding from the FHFC storm fund applications (DLI-Disaster Low-Income). It is expected that the award will be challenged by other applicant(s). Competitors have 15 days to file a Notice of Protest against our application.
 - SHA is looking to challenge another developer's application and may be able to get Cypress Square Phase II/Amaryllis Park Place Phase III (120 Units/4 Story Building) funded. The announcement should be made within the next week.
- The budget for this project is \$46 Million for the whole project (Approximately \$494K per Unit). Construction prices remain high and there will be a parking deck, which is budgeted for approximately \$35K per space/110 spaces). Mr. Chambers confirmed to Commissioner Finger that building tax credit units tends to cost more than building in the private sector.

- Commissioner Meredith inquired if, with the additional floor allowances, an entire 1st floor of retail space could be designated. Mr. Chambers stated that this is possible, but paying for the retail space would necessitate additional types of financing.
- Mr. Russell reported that there's been past discussion about making a rooftop garden or amenity space that was shot down because developments could only go up 7 stories. However, with the Live Local Act this development is eligible for more floors. Commissioner Colón suggested a business similar to the Oak & Stone on the hotel in Bradenton. Mr. Chambers expressed reservations with adding a restaurant/bar type amenity on the roof and added that 3rd party access would be necessary, and the location wouldn't allow for the walk-up pedestrians to frequent the restaurant/bar.
- Discussion took place about the possibilities of adding electric vehicle (EV) charging stations to the parking area. Mr. Chambers will look into this feature being included in the plans. Commissioners Colón and Finger suggested looking for a grant to cover this.

V. MCCOWN TOWER

- Mr. Chambers provided an update on redevelopment progress. Phase II should be nearing completion by the end of the month and Phase III is estimated to be completed by October. The plan is to finish all units by the 1st quarter of next year.

VI. COMP PLAN AMENDMENT

- Mr. Russell reported that SHA has submitted a Comp Plan Amendment with the city for the overlay district. The Live Local Act did not benefit SHA in this case due to the zoning being residential. The amendment is requesting the property on 22nd Street be added into the overlay district, allow developments to go up to 4 stories and amend future land use map for our district to go from 25 units to 50 units per acre. An initial DRC meeting is being held in a couple of weeks. This is a minor Comp Plan Amendment, so it won't have to be submitted to the State for review.
- Commissioner Meredith inquired about how this will affect the funds received by the County that need to be spent within a certain time frame. Mr. Russell responded that he's spoken to the city and let them know that SHA would need to start the design process with the anticipation that the Comp Plan Amendment will be approved, and they seem to think they have the votes to get it approved.

VII. MISCELLANEOUS

- Mr. Russell reported that the city is still interested in helping SHA fund a 250-space public parking garage in the McCown parking lot. The Performing Arts Center is going to need more parking by 2028. The lot would allow for McCown resident parking on the bottom levels and could provide for additional units around and on top of the garage. Mr. Russell added that SHA would receive the public parking revenue. Mr. Chambers reported that the Kimley-Horn site plan (\$35K per space) is a good plan if the city is assisting with the cost. Mr. Russell will circulate the plan to the board.

- Commissioner Finger asked if there are any upcoming training courses being held that deal with Low-Income Tax Credit and Mixed-Use Financing that would be useful to the board. Mr. Russell suggested that perhaps SHA could set up a custom training using Jane Dixon with TAG and Michael Syme, SHA's Development Attorney. They will be presenting sessions at the FAHRO Conference, Aug 22-24, 2023, in Orlando at the Rosen Centre Hotel. The hotel cut-off for reservations is 7/31/23 and early bird registration ends 8/7/23. Mr. Russell will forward the FAHRO Conference Agenda to the board once it's finalized.

VIII. ADJOURNMENT

The Development Committee meeting was adjourned at 5:23 pm.

HOUSING CHOICE VOUCHER MONTHLY BOARD REPORT

HAP Utilization YTD

All HAP Funds 101%

Annual ABA only 120%

Leasing Update

	January	February	March	April	May	June	July	August	September	October	November	December
Homeownership	26	26	27	26	27							
Family Unification Program	37	37	34	34	32							
Port out vouchers that belong to us	19	19	23	21	21							
Veterans Supportive Vouchers Housed	165	163	162	161	163							
Tenant Protection Vouchers	82	80	80	80	80							
Regular Vouchers leased up	1058	1069	1078	1093	1084							
Project Based Vouchers	252	263	266	279	298							
Mainstream	68	72	77	77	77							
Emergency Housing Vouchers	49	51	49	53	52							
City Homeless Preference	33	33	33	33	35							
YMCA Homeless Preference	11	11	11	11	11							
Total Vouchers Leased first of month	1800	1824	1840	1868	1880	0	0	0	0	0	0	0

Port In vouchers that we administer for other agencies

1 1 1 1 5

Total vouchers issued and not leased up

128 158 153 167 151

Homeless Preference Report

	YMCA	CITY
Number of Vouchers Approved	15	60
Number of Vouchers Leased	11	35
Number of Referrals pending approval	0	0
Number of Referrals looking for units	4	0
Number of Empty Slots without a Referral	4	25

Report Instructions: Run VMS Summary Rpt

Resident Characteristics Report

As of May 31, 2023

Program type : **Public Housing**

Level of Information : **State**

Effective Dates Included : **February 01, 2022** through **May 31, 2023**



Download in Excel



Print Page



View Entire Report

NOTE: Percentages in each area may not total 100 percent due to rounding.

Units	Income	TTP	Race/Ethnicity	Household	Length Of Stay
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Units Information

State	ACC Units	50058 Required	50058 Received
US	918,929	761,419	714,746
FL	25,526	20,945	19,334

Janie's Garden Occupancy Report-2023

Month-End: **May 2023**

	Phase I					
	Total Days			# Subsidized	# of Utility Checks	Occupancy %
	Occupied	Vacant	Vacant			
RAD PBV (26)	25	1	1	26	0	96%
LIHTC (41)	39	2	14	16		95%
PBV - None Market (19)	18	1	6	4		94%
Total (86)	82	4	21	46	0	95%

	Phase II					
	Total Days			# Subsidized	# of Utility Checks	Occupancy %
	Occupied	Vacant	Vacant			
RAD PBV (21)	20	1	6	21	0	95%
LIHTC (33)	33	0	0	7	0	100%
PBV (14)	14	0	0	14	0	
Market(0)						
Total (68)	67	1	6	42	0	99%

	Phase III					
	Total Days			# Subsidized	# of Utility Checks	Occupancy %
	Occupied	Vacant	Vacant			
PBV/TPV (26)	25	1	29	0	0	96%
LIHTC (18)	16	2	2	9		88%
PBV (40)	13	0		14		100%
Market (14)	14	1	3	1		93%
Total (72)	68	4	34	24	0	94%

All units are preleased - PBV unit fell through due to office finding out that applicant was falsifying documents and had to reject the applicant right before move in which is why that unit has been vacant so long - they had to start all over again

MEMO

To: William Russell
From: Lance Clayton
CC: File
Date: June 22, 2023
Re: **CFP Report – June**

ONGOING PROJECTS:

McCown Towers and Annex – Non-CFP

Annex Emergency Stairway Exit, Painting and HVAC repairs and replacements – Plans have been completed; due to the McCown project taking up almost half of the parking lot, we are having to postpone this project until the McCown renovation is complete. Staging both projects would not work in the limited space we have.

Betha Mitchell - CFP

Bertha Mitchell – HVAC, HWH and phase III of Sewer repairs & Bertha Mitchell – New exterior doors, new kitchen cabinets and counter tops and new bathrooms – This project went out for bid and we only received one responsive bid and it was over our budget. We are revisiting the scope and will re-issue the IFB within the next couple weeks.

Bertha Mitchell – Icynene Project with Barancik Foundation – The construction part of this project is complete and waiting on the results of the before and after indoor air quality monitoring along with the comparison of before and after electric bills.

GENERAL

22nd Street Lot – The contract between Suarez and SHA has been signed and Suarez is working on getting a submission to the City for the rezone.

Courts – Meetings with FEMA continue; we are working together to submit all necessary documents for federal assistance for the roof damage caused by Hurricane Ian. Suarez is finalizing the bid documents.

Courts – 1743 Gore Court - fire unit, construction is underway, drywall finish is scheduled to start on 6/26/2023.

Flint River – We issued a QSP for the interior painting of the units and bids are due on June 27th.

End of Report

Resident Services Monthly Report May 2023

Resident Assistance

The resident services team has been working with many agencies to assist SHA's children and families. SHA has been the liaison between families and schools assisting with attendance, access to food and intervention coordination. SHA staff has provided daily transportation to schools to 29 students that have missed the bus in efforts to reduce truancy.

After School Program - Youth THRIVE

The afterschool program wrapped up the school year with assisting an average of 23 students per day. Students are assisted with homework by staff and high school students. Students also participate in enrichment activities with our partnering agencies 4H, Sarasota County Library, FunDucation, Suncoast Fab Lab, Suncoast Black Arts Collaborative, SRQ Strong, and Suncoast Conservatory.

SHA held an ACT/ SAT Prep workshop with seven high school students in attendance of the six-week workshop.

McCown Towers

McCown Towers Service Coordinator has been utilizing many resources for the tenants located at the property. There are currently three primary care physicians that visit the property every month. All Faith's food distributions are monthly and provide commodities and fresh produce. Art classes have resumed and remain a favorite among the residents.

On May 17th there were eleven residents of McCown that visited Selby Gardens. They were all pleased with the opportunity to have activity available to them.

Book Rich Environments / Summer Enrichment

SHA will hold the first of its three Book Rich Environments "Summer Kickoff" on June 2nd at the Resident Services Portable. The Books and Badges event will be held on July 13th, and the Back-to-School event on August 3rd. SHA will have the opportunity to put new books into the hands of our children.

Agency Bus

During the month of February SHA used the bus to transport resident of McCown Towers to Wal-Mart. These outings gave resident the opportunity to shop for many items that they would not be able to carry on public transportation or taxi service. The bus was also used to transport students to a Career Fair held at Suncoast Technical College.

Homeownership

During the month of May SHA had two additional families get pre-approved for a home loan and one family receive notice that the home that they were working on through Habitat for Humanity will be ready for closing late June.