

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

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

Definitions.

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

A.	PHA Information.																										
A.1	<p>PHA Name: Somerville Housing Authority PHA Code: MA031 PHA Type: <input checked="" type="checkbox"/> Standard PHA <input type="checkbox"/> Troubled PHA PHA Plan for Fiscal Year Beginning: (MM/YYYY): 04/01/2024 PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Public Housing (PH) Units <u>584</u> Number of Housing Choice Vouchers (HCVs) <u>1322</u> Total Combined Units/Vouchers <u>1906</u> PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission</p> <p>Availability of Information. PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council with a copy of their PHA Plans.</p> <p>SHA’s PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and PHA Plan are available for inspection by the public at the SHA Administrative Office, 30 Memorial Road, Somerville, MA 02145, and our website, www.sha-web.org. Copies of the proposed PHA Plan have been provided to the RAB members participating in the remote RAB meetings. Once approved, the final PHA Plan will replace the draft PHA Plan and will be made available at the SHA Administrative Office and at www.sha-web.org.</p> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below) Not Applicable</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th rowspan="2" style="width: 25%;">Participating PHAs</th> <th rowspan="2" style="width: 10%;">PHA Code</th> <th rowspan="2" style="width: 25%;">Program(s) in the Consortia</th> <th rowspan="2" style="width: 20%;">Program(s) not in the Consortia</th> <th colspan="2" style="width: 20%;">No. of Units in Each Program</th> </tr> <tr> <th style="width: 10%;">PH</th> <th style="width: 10%;">HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:																	
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B.	Plan Elements
B.1	<p>Revision of Existing PHA Plan Elements.</p> <p>(a) Have the following PHA Plan elements been revised by the PHA?</p> <p>Y N</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs EXHIBIT 1</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources. EXHIBIT 2</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Rent Determination. EXHIBIT 3</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Operation and Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Grievance Procedures.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Asset Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Significant Amendment/Modification EXHIBIT 4</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s):</p> <p>See Exhibit 1, Exhibit 2, Exhibit 3 and Exhibit 4 for these changes.</p> <p>(c) The PHA must submit its Deconcentration Policy for Field Office review.</p> <p>The SHA has not changed its Deconcentration Policy. It is attached as Exhibit 5</p>
B.2	<p>New Activities.</p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Mixed Finance Modernization or Development.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Demolition and/or Disposition.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Designated Housing for Elderly and/or Disabled Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Tenant-Based Assistance.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Over-Income Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Police Officers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Non-Smoking Policies.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Project-Based Vouchers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan.</p> <p>Designated Housing for Elderly and/or Disabled Families: 1) Development Number: MA031-19; 2) Designation Type: Elderly and Disabled; 3) Application Status: Designated Housing Plan approved by HUD through March 10, 2024; 4) Date the designation was approved, submitted, or planned for submission: Current Plan submitted January 2017, renewal currently underway, planned date for submission January 2024, 5) The number of units affected: 349 and 6) Expiration date of the designation of any HUD approved plan: March 10, 2024.</p> <p>The SHA plans to issue PBV's to create up to 54 family sized units as part of the Clarendon Hill redevelopment project, which will replace 216 state-aided public housing units and add 80 net new income-restricted rental units. The construction of the new Mystic Water Works II building is scheduled for financial closing in the fall of 2023, with construction starting thereafter. The project is managed through the Construction Manager at Risk process. This project would add up to 21 affordable housing units for elderly households earning up to 80% of AMI.</p> <p>Both projects work toward advancing the SHA's mission of creating and expanding decent, safe, and sanitary affordable housing opportunities for low- and moderate-income families, elderly, and people with disabilities. The projects also address the Housing Needs identified in the City of Somerville's FY18-22 Consolidated Plan, namely to help reduce the high percentage of the City's low-moderate income households that are housing cost burdened (74%) and the need for the creation of additional affordable housing.</p>

	<p>The SHA also plans to renovate vacant units using Force Account Labor (as approved in the CFP and as reported/requested in accordance with Notice PIH 2021-35 and successor notices).</p>
<p>B.3</p>	<p>Progress Report.</p> <p>Provide a description of the PHA’s progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.</p> <p>The SHA continues to work with partner agencies to stabilize tenancies, including participation in emergency rental assistance programs. The SHA continues to fund Provider Grants for activities directly benefiting residents (\$100,000 last fiscal year). As stated in Section B.2 above, the SHA is advancing two development projects that will create 101 new affordable rental units in the city.</p>
<p>B.4</p>	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.</p> <p>See 2023- 2027 Capital Fund 5-Year Action Plan in EPIC approved by HUD on 10/25/2023. See Exhibit 6.</p> <p>A draft of the 2024-2028 Capital Funding Program Five-Year Action Plan is included as Exhibit 7.</p>
<p>B.5</p>	<p>Most Recent Fiscal Year Audit.</p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:</p>
<p>C. Other Document and/or Certification Requirements.</p>	
<p>C.1</p>	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y N <input type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p>
<p>C.2</p>	<p>Certification by State or Local Officials.</p>

	<p>Form HUD 50077-SL, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>			
<p>C.3</p>	<p>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</p> <p>Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>			
<p>C.4</p>	<p>Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public.</p> <p>(a) Did the public challenge any elements of the Plan?</p> <p>Y N <input type="checkbox"/> <input type="checkbox"/></p> <p>If yes, include Challenged Elements.</p>			
<p>C.5</p>	<p>Troubled PHA.</p> <p>(a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place? Y N N/A <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:</p>			
<p>D. Affirmatively Furthering Fair Housing (AFFH).</p>				
<p>D.1</p>	<p>Affirmatively Furthering Fair Housing (AFFH).</p> <p>Provide a statement of the PHA’s strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.</p> <table border="1" data-bbox="180 1444 1455 1896"> <tr> <td data-bbox="180 1444 1455 1486"> <p>Fair Housing Goal:</p> </td> </tr> <tr> <td data-bbox="180 1486 1455 1528"> <p><u><i>Describe fair housing strategies and actions to achieve the goal</i></u></p> </td> </tr> <tr> <td data-bbox="180 1528 1455 1896"> <p>Until such time as the SHA is required to submit an AFH, the SHA will not have to complete this section. Nevertheless, the SHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015.</p> </td> </tr> </table>	<p>Fair Housing Goal:</p>	<p><u><i>Describe fair housing strategies and actions to achieve the goal</i></u></p>	<p>Until such time as the SHA is required to submit an AFH, the SHA will not have to complete this section. Nevertheless, the SHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015.</p>
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Instructions for Preparation of Form HUD-50075-ST Annual PHA Plan for Standard and Troubled PHAs

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

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

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

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

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

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

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

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

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

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

Rent Determination. A statement of the policies of the PHA governing rents charged for public housing and HCV dwelling units, including applicable public housing flat rents, minimum rents, voucher family rent contributions, and payment standard policies. [\(24 CFR §903.7\(d\)\)](#)

Operation and Management. A statement of the rules, standards, and policies of the PHA governing maintenance and management of housing owned, assisted, or operated by the public housing agency (which shall include measures necessary for the prevention or eradication of pest infestation, including cockroaches), and management of the PHA and programs of the PHA. [\(24 CFR §903.7\(e\)\)](#)

Grievance Procedures. A description of the grievance and informal hearing and review procedures that the PHA makes available to its residents and applicants. [\(24 CFR §903.7\(f\)\)](#)

Homeownership Programs. A description of any Section 5h, Section 32, Section 8y, or HOPE I public housing or Housing Choice Voucher (HCV) homeownership programs (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval. [\(24 CFR §903.7\(k\)\)](#)

Community Service and Self Sufficiency Programs. Describe how the PHA will comply with the requirements of [\(24 CFR §903.7\(l\)\)](#). Provide a description of: **1)** Any programs relating to services and amenities provided or offered to assisted families; and **2)** Any policies or programs of the PHA for the enhancement of the economic and social self-sufficiency of assisted families, including programs subject to Section 3 of the Housing and Urban Development Act of 1968 (24 CFR Part 135) and FSS. [\(24 CFR §903.7\(l\)\)](#)

Safety and Crime Prevention (VAWA). Describe the PHA's plan for safety and crime prevention to ensure the safety of the public housing residents. The statement must provide development-by-development or jurisdiction wide-basis: (i) A description of the need for measures to ensure the safety of public housing residents; (ii) A description of any crime prevention activities conducted or to be conducted by the PHA; and (iii) A description of the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities. [\(24 CFR §903.7\(m\)\)](#) A description of: **1)** Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; **2)** Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and **3)** Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families. [\(24 CFR §903.7\(m\)\(5\)\)](#)

Pet Policy. Describe the PHA's policies and requirements pertaining to the ownership of pets in public housing. [\(24 CFR §903.7\(n\)\)](#)

Asset Management. State how the agency will carry out its asset management functions with respect to the public housing inventory of the agency, including how the agency will plan for the long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs for such inventory. [\(24 CFR §903.7\(q\)\)](#)

Substantial Deviation. PHA must provide its criteria for determining a "substantial deviation" to its 5-Year Plan. [\(24 CFR §903.7\(r\)\(2\)\(i\)\)](#)

Significant Amendment/Modification. PHA must provide its criteria for determining a "Significant Amendment or Modification" to its 5-Year and Annual Plan. For modifications resulting from the Rental Assistance Demonstration (RAD) program, refer to the 'Sample PHA Plan Amendment' found in Notice PIH-2012-32 REV-3, successor RAD Implementation Notices, or other RAD Notices.

If any boxes are marked "yes", describe the revision(s) to those element(s) in the space provided.

PHAs must submit a Deconcentration Policy for Field Office review. For additional guidance on what a PHA must do to deconcentrate poverty in its development and comply with fair housing requirements, see [24 CFR 903.2](#). [\(24 CFR §903.23\(b\)\)](#)

B.2 New Activities. If the PHA intends to undertake any new activities related to these elements in the current Fiscal Year, mark "yes" for those elements, and describe the activities to be undertaken in the space provided. If the PHA does not plan to undertake these activities, mark "no."

HOPE VI or Choice Neighborhoods. **1)** A description of any housing (including project number (if known) and unit count) for which the PHA will apply for HOPE VI or Choice Neighborhoods; and **2)** A timetable for the submission of applications or proposals. The application and approval process for Hope VI or Choice Neighborhoods is a separate process. See guidance on HUD's website at:

https://www.hud.gov/program_offices/public_indian_housing/programs/ph/hope6. [\(Notice PIH 2011-47\)](#)

Mixed Finance Modernization or Development. 1) A description of any housing (including project number (if known) and unit count) for which the PHA will apply for Mixed Finance Modernization or Development; and 2) A timetable for the submission of applications or proposals. The application and approval process for Mixed Finance Modernization or Development is a separate process. See guidance on HUD's website at: https://www.hud.gov/program_offices/public_indian_housing/programs/ph/hopec6/mfph#4

Demolition and/or Disposition. With respect to public housing only, describe any public housing development(s), or portion of a public housing development projects, owned by the PHA and subject to ACCs (including project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition approval under section 18 of the 1937 Act (42 U.S.C. 1437p); and (2) A timetable for the demolition or disposition. This statement must be submitted to the extent that approved and/or pending demolition and/or disposition has changed as described in the PHA's last Annual and/or 5-Year PHA Plan submission. The application and approval process for demolition and/or disposition is a separate process. Approval of the PHA Plan does not constitute approval of these activities. See guidance on HUD's website at: http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm. (24 CFR §903.7(h))

Designated Housing for Elderly and Disabled Families. Describe any public housing projects owned, assisted or operated by the PHA (or portions thereof), in the upcoming fiscal year, that the PHA has continually operated as, has designated, or will apply for designation for occupancy by elderly and/or disabled families only. Include the following information: 1) development name and number; 2) designation type; 3) application status; 4) date the designation was approved, submitted, or planned for submission, 5) the number of units affected and; 6) expiration date of the designation of any HUD approved plan. **Note:** The application and approval process for such designations is separate from the PHA Plan process, and PHA Plan approval does not constitute HUD approval of any designation. (24 CFR §903.7(i)(C))

Conversion of Public Housing under the Voluntary or Mandatory Conversion programs. Describe any public housing building(s) (including project number and unit count) owned by the PHA that the PHA is required to convert or plans to voluntarily convert to tenant-based assistance; 2) An analysis of the projects or buildings required to be converted; and 3) A statement of the amount of assistance received to be used for rental assistance or other housing assistance in connection with such conversion. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/centers/sac/conversion.cfm>. (24 CFR §903.7(j))

Conversion of Public Housing under the Rental Assistance Demonstration (RAD) program. Describe any public housing building(s) (including project number and unit count) owned by the PHA that the PHA plans to voluntarily convert to Project-Based Rental Assistance or Project-Based Vouchers under RAD. See additional guidance on HUD's website at: [Notice PIH 2012-32 REV-3, successor RAD Implementation Notices, and other RAD notices.](#)

Occupancy by Over-Income Families. A PHA that owns or operates fewer than two hundred fifty (250) public housing units, may lease a unit in a public housing development to an over-income family (a family whose annual income exceeds the limit for a low income family at the time of initial occupancy), if all the following conditions are satisfied: (1) There are no eligible low income families on the PHA waiting list or applying for public housing assistance when the unit is leased to an over-income family; (2) The PHA has publicized availability of the unit for rental to eligible low income families, including publishing public notice of such availability in a newspaper of general circulation in the jurisdiction at least thirty days before offering the unit to an over-income family; (3) The over-income family rents the unit on a month-to-month basis for a rent that is not less than the PHA's cost to operate the unit; (4) The lease to the over-income family provides that the family agrees to vacate the unit when needed for rental to an eligible family; and (5) The PHA gives the over-income family at least thirty days notice to vacate the unit when the unit is needed for rental to an eligible family. The PHA may incorporate information on occupancy by over-income families into its PHA Plan statement of deconcentration and other policies that govern eligibility, selection, and admissions. See additional guidance on HUD's website at: [Notice PIH 2011-7.](#) (24 CFR 960.503) (24 CFR 903.7(b))

Occupancy by Police Officers. The PHA may allow police officers who would not otherwise be eligible for occupancy in public housing, to reside in a public housing dwelling unit. The PHA must include the number and location of the units to be occupied by police officers, and the terms and conditions of their tenancies; and a statement that such occupancy is needed to increase security for public housing residents. A "police officer" means a person determined by the PHA to be, during the period of residence of that person in public housing, employed on a full-time basis as a duly licensed professional police officer by a Federal, State or local government or by any agency of these governments. An officer of an accredited police force of a housing agency may qualify. The PHA may incorporate information on occupancy by police officers into its PHA Plan statement of deconcentration and other policies that govern eligibility, selection, and admissions. See additional guidance on HUD's website at: [Notice PIH 2011-7.](#) (24 CFR 960.505) (24 CFR 903.7(b))

Non-Smoking Policies. The PHA may implement non-smoking policies in its public housing program and incorporate this into its PHA Plan statement of operation and management and the rules and standards that will apply to its projects. See additional guidance on HUD's website at: [Notice PIH 2009-21 and Notice PIH-2017-03.](#) (24 CFR §903.7(e))

Project-Based Vouchers. Describe any plans to use Housing Choice Vouchers (HCVs) for new project-based vouchers, which must comply with PBV goals, civil rights requirements, Housing Quality Standards (HQS) and deconcentration standards, as stated in 983.57(b)(1) and set forth in the PHA Plan statement of deconcentration and other policies that govern eligibility, selection, and admissions. If using project-based vouchers, provide the projected number of project-based units and general locations, and describe how project-basing would be consistent with the PHA Plan (24 CFR §903.7(b)).

Units with Approved Vacancies for Modernization. The PHA must include a statement related to units with approved vacancies that are undergoing modernization in accordance with 24 CFR §990.145(a)(1).

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

For all activities that the PHA plans to undertake in the current Fiscal Year, provide a description of the activity in the space provided.

B.3 Progress Report. For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA's progress in meeting the mission and goals described in the 5-Year PHA Plan. (24 CFR §903.7(r)(1))

B.4 Capital Improvements. PHAs that receive funding from the Capital Fund Program (CFP) must complete this section (24 CFR §903.7(g)). To comply with this requirement, the PHA must reference the most recent HUD approved Capital Fund 5 Year Action Plan in EPIC and the date that it was approved. PHAs can reference the form by including the following language in the Capital Improvement section of the appropriate Annual or Streamlined PHA Plan Template: "See Capital Fund 5 Year Action Plan in EPIC approved by HUD on XX/XX/XXXX."

B.5 Most Recent Fiscal Year Audit. If the results of the most recent fiscal year audit for the PHA included any findings, mark “yes” and describe those findings in the space provided. ([24 CFR §903.7\(p\)](#))

C. Other Document and/or Certification Requirements.

C.1 Resident Advisory Board (RAB) comments. If the RAB had comments on the annual plan, mark “yes,” submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA’s decision made on these recommendations. ([24 CFR §903.13\(c\)](#), [24 CFR §903.19](#))

C.2 Certification by State of Local Officials. Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. ([24 CFR §903.15](#)). Note: A PHA may request to change its fiscal year to better coordinate its planning with planning done under the Consolidated Plan process by State or local officials as applicable.

C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan. Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*. Form HUD-50077-ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed* must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the certification requirement to affirmatively further fair housing if the PHA fulfills the requirements of §§ 903.7(o)(1) and 903.15(d) and: (i) examines its programs or proposed programs; (ii) identifies any fair housing issues and contributing factors within those programs, in accordance with 24 CFR 5.154 or 24 CFR 5.160(a)(3) as applicable; (iii) specifies actions and strategies designed to address contributing factors, related fair housing issues, and goals in the applicable Assessment of Fair Housing consistent with 24 CFR 5.154 in a reasonable manner in view of the resources available; (iv) works with jurisdictions to implement any of the jurisdiction’s initiatives to affirmatively further fair housing that require the PHA’s involvement; (v) operates programs in a manner consistent with any applicable consolidated plan under 24 CFR part 91, and with any order or agreement, to comply with the authorities specified in paragraph (o)(1) of this section; (vi) complies with any contribution or consultation requirement with respect to any applicable AFH, in accordance with 24 CFR 5.150 through 5.180; (vii) maintains records reflecting these analyses, actions, and the results of these actions; and (viii) takes steps acceptable to HUD to remedy known fair housing or civil rights violations, impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction’s initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. ([24 CFR §903.7\(o\)](#)).

C.4 Challenged Elements. If any element of the Annual PHA Plan or 5-Year PHA Plan is challenged, a PHA must include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA’s response to the public.

C.5 Troubled PHA. If the PHA is designated troubled, and has a current MOA, improvement plan, or recovery plan in place, mark “yes,” and describe that plan. Include dates in the description and most recent revisions of these documents as attachments. If the PHA is troubled, but does not have any of these items, mark “no.” If the PHA is not troubled, mark “N/A.” ([24 CFR §903.9](#))

D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing. The PHA will use the answer blocks in item D.1 to provide a statement of its strategies and actions to implement each fair housing goal outlined in its accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5) that states, in relevant part: “To implement goals and priorities in an AFH, strategies and actions shall be included in program participants’ ... PHA Plans (including any plans incorporated therein) Strategies and actions must affirmatively further fair housing” Use the chart provided to specify each fair housing goal from the PHA’s AFH for which the PHA is the responsible program participant – whether the AFH was prepared solely by the PHA, jointly with one or more other PHAs, or in collaboration with a state or local jurisdiction – and specify the fair housing strategies and actions to be implemented by the PHA during the period covered by this PHA Plan. If there are more than three fair housing goals, add answer blocks as necessary.

Until such time as the PHA is required to submit an AFH, the PHA will not have to complete section D., nevertheless, the PHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015, which means that it examines its own programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction’s initiatives to affirmatively further fair housing that require the PHA’s involvement; and maintain records reflecting these analyses and actions. Furthermore, under Section 5A(d)(15) of the U.S. Housing Act of 1937, as amended, a PHA must submit a civil rights certification with its Annual PHA Plan, which is described at 24 CFR 903.7(o)(1) except for qualified PHAs who submit the Form HUD-50077-CR as a standalone document.

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year and Annual PHA Plan.

Public reporting burden for this information collection is estimated to average 7.52 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

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

Statement of Housing Needs and Strategy for Addressing Housing Needs.

According to the City of Somerville's *FY2018-2022 Consolidated Plan*, the overwhelming housing problem facing the residents of Somerville is a housing cost burden. The housing cost burden disproportionately impacts the city's low- and moderate-income residents. At the same time the city – and region – are experiencing historically low vacancy rates, and the Consolidated Plan cites a demographic trend of increasing single person households occupying all types of units, placing added pressure on supply, and reducing the availability of affordable family-sized units. According to the Consolidated Plan, this has caused many households to be forced into overcrowded conditions or be forced into units that are considered substandard.

The City of Somerville's *FY2018-2022 Consolidated Plan* and data from the Assessment of Fair Housing also cite that Black, Hispanic, Native American, and other non-Hispanic Somerville residents experience higher rates of the four housing problems – incomplete kitchen facilities, incomplete plumbing facilities, more than 2 persons per bedroom, and cost burden greater than 40% - than White and Asian or Pacific Islander Somerville residents. Just under 40% of Somerville residents in all the race/ethnicity categories experienced these issues.

Overall, the *Consolidated Plan* cites several contributing factors to the affordability crisis:

- Income and wage growth have not kept pace with the appreciation in housing costs and the standard cost of living.
- Federal resource programs such as the Housing Choice Voucher (HCV) Program, do not match the need experienced to compete with market rates.
- The appreciation in home sale asking prices has caused home-ownership to move further out of reach for low-income and moderate-income residents.
- The lack of vacant land ready to development and high per s/f costs for property for either rehabilitation, conversion from commercial to residential, and certainly demolition and new construction perpetuates the impediments to increasing the supply of not just affordable housing but any housing.
- Necessary infrastructure and public facility improvements (including water, sewer, and utilities) is also an obstacle to smart growth and new housing development.

As instructed in HUD’s Agency Plan Desk Guide, the SHA rated the impact of several factors on the housing needs of families in the jurisdiction, by family type.

Family types include: families with income less than or equal to 30 percent of area median income (AMI); families with income greater than 30 percent but less than or equal to 50 percent of AMI; families with income greater than 50 percent but less than 80 percent of AMI; elderly families; families with disabilities; and family type by race/ethnicity.

A rating of “1” indicates “no impact.” “5” indicates “severe impact.”

Housing Needs of Families in the Jurisdiction Served by the PHA							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <=30% AMI	5,175	5	5	4	3	4	4
Income >30% but <=50% AMI	3,600	5	5	4	3	4	4
Income >50% but <80% AMI	4,055	5	5	4	3	4	4
Elderly Families	6,425	5	5	3	4	3	4
Families with individuals with disabilities	6,351	5	5	3	4	4	4
Race – White	10,075	4	4	3	3	4	4
Race – Black	1,088	5	5	4	3	5	4
Race – Asian	1,195	4	4	3	3	4	4
Race – Native American	69	5	5	4	3	5	4
Race – Pacific Islander	4	4	4	3	3	4	4
Ethnicity – Hispanic	1,525	5	5	4	3	5	4

Data sources:
City of Somerville 2018-2022 Consolidated Plan, Housing Needs Assessment
US Census Data ACS 2014-2019

As instructed in HUD’s PHA Plan Desk Guide, the SHA compiled information about the families on the SHA’s Low Income Public Housing (LIPH) and Housing Choice Voucher (HCV) Program waiting lists. This information is provided below.

Housing Needs of Families on the Public Housing Waiting List*			
	# of Families	% of Total Families	Annual Turnover
Waiting List Total	1,998		N/A
Extremely Low Income <=30% AMI	1,773	89%	
Very Low Income (>30% but <=50% AMI)	185	9%	
Low Income (>50% but <80% AMI)	35	2%	
Families with Children	536	27%	
Elderly Families	631	32%	
Families with Disabilities	620	31%	
Race – White	672	34%	
Race – Black	509	25%	
Race – Asian	79	4%	
Race – Alaska Native or American Indian	8	0%	
Race – Pacific Islander	0	0%	
Race – Other	729	36%	
Ethnicity – Hispanic	444	22%	
Ethnicity – Non-Hispanic	1,554	78%	
Characteristics by Bedroom Size			
0 BR	0	0%	
1 BR	1,347	67%	
2 BR	437	22%	
3 BR	169	8%	
4 BR	22	1%	
5+ BR	23	1%	
Is the Waiting List Closed?	No		

Source: PHA Web Waiting List Statistical Summary Report; data as of 9/8/2023

The SHA has 1,998 applicants on its LIPH Waiting List, which is an increase of 5% over the prior year. The greatest need for housing in the Public Housing program continues to be one-bedroom units, which is currently 1,347 applicants followed by two-bedroom units, (437 applicants). We continue to see the affordable one-bedroom demand continue to grow throughout our housing programs. An overwhelming majority of applicants (89%) report a household income at or below 30% of AMI.

Housing Needs of Families on the Housing Choice Voucher (HCV) Program Waiting List			
	# of Families	% of Total Families	Annual Turnover
Waiting List Total (local)	2,042		N/A
Extremely Low Income <=30% AMI	1,594	78%	
Very Low Income (>30% but <=50% AMI)	370	18%	
Low Income (>50% but <80% AMI)	62	3%	
Families with Children	448	22%	
Elderly Families	389	19%	
Families with Disabilities	337	17%	
Race – White	845	41%	
Race – Black	638	31%	
Race – Asian	156	8%	
Race – Alaska Native or American Indian	27	1%	
Race – Pacific Islander	16	1%	
Ethnicity – Hispanic	551	27%	
Is the Waiting List Closed?	No		

Source: SHA Waitlist Report, *AffordableHousing.com*; data as of 9/8/2023

The SHA has 2,042 local applicants on its HCV Waiting List. Approximately seventy-eight (78%) of these applicants report household income at or below thirty percent (30%) of the AMI.

The need for housing choice vouchers is spread amongst all family types – families with children, elderly, and families with an individual with a disability. Households in HCV housing search continue to experience impediments to finding units within the SHA’s payment standard.

To combat this hardship, effective August 1, 2023, the SHA adopted the Small Area Fair Market Rents (SAFMR) for Boston, Cambridge, and Somerville area codes to implement payment standards that are more fine-tuned to the local housing market.

As instructed in HUD’s PHA Plan Desk Guide, below are strategies and reasons for employing these strategies that the SHA will undertake in the coming year to address the needs outlined above.

Possible Strategies for Addressing Housing Needs	Indicates Adopted Strategies	Reasons for Employing Strategies
Maximize the number of affordable housing units available to the PHA within its current resources	X	The region has a severe shortage of accessible, affordable housing.
Increase the number of affordable housing units	X	Decrease homelessness and high rate of housing cost-burdened households.
Target available assistance to families at or below 30% of AMI	X	83% of the applicants on the SHA’s waiting lists earn below 30% of AMI.
Target available assistance to families at or below 50% of AMI	X	14% of the applicants on the SHA’s waiting lists earn between 30 and 50% of AMI.
Target available assistance to the elderly	X	The <i>Consolidated Plan</i> notes a need to ease housing cost burden for elderly households, many of whom are on fixed income and experience rising housing costs.
Target available assistance to families with disabilities	X	Individuals with disabilities can experience housing instability and/or barriers to accessibility.
Increase awareness of PHA resources among families of races and ethnicities with disproportionate need	X	SHA is committed to continuing to reach populations with disproportionate housing needs.

The following activities will support the above strategies for addressing housing needs for low-income individuals and families:

- Promote unit turnover within the SHA LIPH Program by improving the ability of economically stabilized households with the wherewithal to make the transition to become home-owners on a regional basis.
- Continue efforts to stabilize families by working with community partners to assist residents and promote workforce readiness through continued operation of SHA’s FSS Program and by funding provider grants for programs directly benefiting SHA residents.
- Continue to invest in capital expenditures at SHA-owned properties to ensure a marketable and healthy environments for eligible residents.
- Continue to make modifications to LIPH units to enhance accessibility and honor reasonable requests for physical accommodation(s) whenever possible.
- Track the impact of SAFMR implementation for SHA’s Housing Choice Voucher (HCV) Program. Consider seeking a waiver from the U.S. Department of Housing & Urban Development (HUD) to apply SAFMR HCV payment standards by census tract.
- Maximize the use of Project-based Vouchers under the regulatory requirements of 24 CFR 983 as a tool in the development of long-term affordable housing within the City of Somerville.
- Continue to promote collaboration with local service providers for distribution of information about housing and supportive service options.

(REFERRED TO IN PLAN AS EXHIBIT C)
FINANCIAL RESOURCES
SOMERVILLE HOUSING AUTHORITY

Financial Resource: <u>PROJECTED/ESTIMATED 2024</u> Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY2022 grants)		
a) Public Housing Operating Fund	2,929,326	Daily Operations
b) Public Housing Capital Fund 2023	1,876,219	Federal Mod
c) Annual Contribution SRO Tenant Based Assistance	133,056 24,192	Haps SRO 1& 3 Admin
d) HOPE VI Demolition	0	
e) Annual Contribution for Section 8 Tenant –Based Assistance	23,479,289 1,939,678	Haps Sec 8 & Admin
f) Annual Contribution for Mainstream Tenant –Based Assistance	1,843,927 202,532	Haps Mainstream & Admin
g) Resident Opportunity and Self Sufficiency Grants ROSS FSS ROSS 3 year	 191,987 0	Resident Services
h) Community Development Block Grant	N/A	
i) HOME	N/A	
Other Federal Grants (list below)		
2. Prior Year Federal Grants (un-obligated funds only) (list below)		
Capital Fund 2020	0	P H Capital Improvements
Capital Fund 2021	0	P H Capital Improvements
Capital Fund 2022	434,594	P H Capital Improvements
3. Public Housing Dwelling Rental Income	4,024,484	PH OPERATIONS
4. Other income (list below)		
Excess Utility		
Miscellaneous / Laundry Receipts	12,922	PH OPERATIONS
Investment	8,700	PH OPERATIONS
5. Non-Federal Sources		
Non dwelling rent: rooftop antenna leases	433,375	PH OPERATIONS
Total Resources	37,534,281	

SOMERVILLE HOUSING AUTHORITY RENT COLLECTION POLICY

I. POLICY STATEMENT

This policy is adopted by the Somerville Housing Authority (SHA) and applies to all residents in both state and federal housing. It addresses the manner in which residents must pay their monthly rent and the consequences of late payment or non-payment of rent due to SHA. This policy is consistent with the laws of the Commonwealth of Massachusetts, HUD regulations, EOHLC regulations, and SHA's Dwelling Leases. The SHA is committed to enforcing this policy in an equitable and non-discriminatory manner.

The Rent Collection Policy is designed to achieve the following goals:

- Maintain the SHA's resident accounts receivable at no more than 5%.
- Clarify for both resident and staff, the SHA's posture with regard to rent collection.
- Establish guidelines extending Repayment Agreements in appropriate circumstances as defined by the SHA or for retroactive rent charges.
- Streamline and simplify the legal process used by SHA.

II. MONTHLY RENT

In accordance with HUD regulations, residents of federal developments are charged 30% of their monthly adjusted income for rent. Adjusted income is calculated by deducting from gross income allowable expenses, such as childcare and medical, as well as deductions for dependents and elderly households. Eligibility for specific allowances depends upon the tenant's individual circumstances.

Residents of state elderly/handicapped developments who pay no utilities are charged 30% of net monthly income and residents of family developments who pay no utilities are charged 32% of net monthly income.

In state developments where utilities are paid by the resident, a resident's share of rent is based on 30% of income in family housing and 25% of income in elderly/handicapped housing. (*See Section IV below*).

In federal developments where utilities are paid by the resident, a utility allowance is deducted from the rent. In federal developments where residents provide a refrigerator an allowance is deducted from the rent. (*See Section IV below*).

III. RENT PAYMENTS

Rent shall be paid by (1) mailing to SHA's Lock Box at Eastern Bank to: Somerville Housing Authority, Post Office Box 277, Medford, MA 02155; (2) tendering in person at any Eastern Bank branch; or (3) by contacting the SHA Housing Manager to set up automatic payment from the resident's bank account. Residents when paying rent at the bank will include a rent coupon (which is obtained from the resident's housing manager) with their payment. Agencies which are paying rent on behalf of a resident may mail or hand-deliver the rent to the SHA's Administrative Office, who will date-stamp a copy of the payment and, upon request, provide a receipt. Agencies may also pay rent on behalf of a tenant via electronic deposit.

Rent is due and payable on the first of each month. However, where a resident receives a monthly benefit on third day of the month (e.g. SSDI) or such other day within the first seven days of the month, then upon the resident's request, the due date shall be the first business day following the scheduled receipt of the benefit. Additionally, a resident may request, in writing, an alternative rent payment schedule (such as paying twice per month in accordance with receipt of income) which request shall not be unreasonably denied. In the event that the resident shall fail to pay all or any part of the rent within seven (7) days of its due date, the SHA may consider the unpaid rent delinquent and issue a Private Conference Notice. Except where Tenant (in state-aided public housing) has been habitually delinquent in paying rent and has had a prior opportunity for discussion within the prior six (6) months, the SHA shall provide the (state-aided public housing) Tenant with an opportunity to discuss the reason for the late payment. For all federal public housing tenants, the SHA shall offer the Tenant an opportunity to discuss the reason for the late payment of rent.

Inquiries about rents due and the collection process should be directed to the site management offices. These offices do not accept rent payments. Office hours and contact information will be posted on the SHA website and to site management offices. Where a manager is on vacation or other leave, the manager shall so indicate the dates of absence and person(s) covering on his/her telephone and email and posting in a location accessible to residents of that development.

Rent payment in full is required by the SHA. SHA does, however, reserve the right to accept partial payments.

The SHA provides residents with a grace period to pay their rent. Residents who have failed to make full payment by 4:00 PM on the seventh calendar day of each month are considered delinquent unless there is a different agreed upon rent payment schedule. If the seventh calendar day of the month falls on a weekend or holiday, rent will not be considered delinquent until 4:00 PM the next business day. Residents who pay their full rent but fail to pay miscellaneous charges properly due may also be subject to legal action in accordance with their Lease Agreement.

The SHA will not charge late fees (or interest) for a tenant's failure to pay rent when due.

IV. UTILITIES AND MISCELLANEOUS CHARGES

Utilities and quantities of such utilities to be supplied to each resident are included in the resident's monthly rent, with the following exceptions. Residents of Mystic View Apartments and James Corbett Apartments are responsible for direct payment of electric lighting services and residents of Mystic River Apartments are responsible for payment of their electric for cooking and lighting

service. For all federal developments a \$25.00 per year charge will be added to the Total Tenant Payment of residents for each air conditioner installed by the household.

Other miscellaneous charges may be assessed to residents for damages to the premises, equipment therein, development buildings, facilities, or common areas caused by residents, household members, or guests¹. Normal wear and tear is expected. Where damage is caused by a perpetrator of domestic violence (and that person does not live in the unit or is removed from the unit), the resident will not be charged for such damage.

Residents shall be notified in writing of such other miscellaneous charges and the right and procedure to request a grievance hearing to contest said charges.

V. RENT DISPUTES

Residents of federal developments who wish to dispute the amount of rent or other charges billed may do so through the SHA's Grievance Procedure in effect at the time the grievance or appeal arises. Copies of the Grievance Procedure are posted in each management office and management staff can assist residents with informally settling the grievance and scheduling any subsequent hearing.

Pursuant to M.G.L. c.121B, §32 and the SHA lease for state-aided units, residents residing in state units are not provided an opportunity for a grievance hearing in the event of nonpayment of rent but they are provided the opportunity for a grievance hearing if they dispute the rent calculation

VI. RESTRICTIONS ON EVICTIONS BASED ON HIGH INCOME

The SHA shall not commence eviction proceedings or refuse to renew a lease based upon the income of the resident family unless:

1. (Federal developments) If, **after January 1, 2025**, a resident family is “over income” for 24 consecutive months, then their lease will be terminated in six months after the end of those 24 months and they will need to move. “Over income” is defined as having household income of more than 120% of the area median income for the Boston-Cambridge-Quincy area for that household size. This is explained in detail in Chapter 13 of the SHA’s Admissions and Continued Occupancy Policy.
2. (State developments) 32% (for family developments) or 30% (for elderly/disabled developments) of the Resident’s net household income equals or exceeds the fair market rent for Somerville under the Section 8 housing choice program and the Resident cannot show there to be a hardship that prevents relocation of the household to unsubsidized housing, thus allowing a 6-month exemption. If the Resident’s net household income decreases such that the 32 or 30% no longer equals or exceeds the applicable fair market rent, then any notice of tenancy termination shall be withdrawn.

VII. REPAYMENT AGREEMENTS

Where there are circumstances involving hardship and in cases of retroactive rent charges, SHA may enter into a "Repayment Agreement" extending the time allowed residents to make full payment of money that is owed. Repayment agreements are made at the discretion of the SHA

¹ Where an apartment or building is scheduled for demolition or extensive rehabilitation, then Residents will not be assessed charges for such damage unless deliberately caused.

and shall generally be in the form of a court ordered agreement for judgment. The SHA is under no obligation to approve and execute repayment agreements and does so only as an accommodation to residents or where otherwise required to do so by law (as in the case of a reasonable accommodation to a resident with a disability). Once a judgment is entered, residents failing to make the required court ordered payments may be subject to further action including eviction by SHA upon a court's allowance of a motion for issuance of execution after hearing.

Other unforeseen circumstances and income disruptions which typically pose financial hardships (e.g., loss of job, permanent discontinuation or reduction in benefits) entitle residents to request an interim reexamination. For federally-aided public housing, a rent reduction is effective the first of the month in which an income decrease was reported (where reported no later than the 15th of the month) and effective the first of the following month after the income decrease was reported (where reported after the 15th of the month), subject to the SHA obtaining verification of the change. For state-aided public housing, a rent reduction is effective on the first of the month following verification of the change but SHA will reduce the rent effective on the first day of the month following report of the change where the delay in verifications was not due to the fault of the tenant. Failure to report a decrease in income is generally not considered a hardship unless a medical reason or other extenuating circumstances existed which prevented the resident from reporting or verifying the decrease in income.

Residents who need assistance with financial problems may contact their Housing Manager for information and referral to community agencies. See Appendix A for possible sources of funding and services.

Where a Resident has complied with a repayment agreement and has not had a subsequent repayment agreement for two (2) years, the SHA shall indicate that the resident has timely paid rent on any request for a landlord reference.

VIII. SUMMARY PROCESS ACTION

Non-payment of rent is considered a serious violation of the Lease Agreement between the resident and the SHA. In all cases, SHA will aggressively pursue collection of the amount of rent due and eviction, if necessary. Action is taken against residents for only the amount of rent due. Collection for any physical damages to the unit and other charges (excluding court costs as stated below) are regarded as a separate matter. The following is a description of the steps taken and notices issued:

- In the event that Tenant shall fail to pay all or any part of the rent within seven (7) days of its due date, the SHA may consider the unpaid rent delinquent and issue a Notice to Quit. Prior to issuing such a notice, except where a state-aided public housing Tenant has been habitually delinquent in paying rent and has had a prior opportunity for discussion within the prior six (6) months, the SHA shall provide the Tenant with an opportunity to discuss the reason for the late payment at a Pre-Termination Conference and (for federally-aided public housing) a Grievance Hearing
- A Pre-Termination Conference Notice is prepared by the Housing Manager within seven (7) days of the rent being delinquent. The notice shall cite the lease violation. The notice schedules the time, date, and location of the conference. The notice is mailed to the resident.
- At the Pre-Termination Conference, the Housing Manager and the resident shall

discuss the rent due. If a state-aided resident fails to pay the rent due at or before the Private Conference a thirty (30) day Notice to Quit will be served on the Tenant via constable. If a federally-aided resident fails to pay the rent due at or before the Private Conference, then a summary of the private Conference (with notice of grievance rights) will be prepared and sent to the resident. The thirty (30) day Notice to Quit may be served on the federally aided resident only after the SHA receives a favorable decision after a grievance hearing or the time for the resident to request a grievance hearing has expired without such a request being made.

- The Notice to Quit shall cite the lease violation and is served by a constable to each delinquent resident. If the notice is left at the last and usual place of abode it must also be mailed to the resident. The City of Somerville's current Housing Stabilization Notice and any other required state notices will be served with the Notice to Quit.
- The Notice indicates that, for legal action to be discontinued, the rent due must be paid in full by the date by which an answer in a summary process action is due. . If a resident offers full payment of the rent due (including any subsequent month) by this date, the payment will be accepted and no further action taken to evict the resident. Full payment may include a firm written commitment from an agency to pay the balance. If the rent is not paid in full by that due date, the SHA may proceed with legal action and may assess a fee covering court expenses for serving a Notice to Quit, serving summary process summons and complaint, and a filing fee. These court fees may be added to the total amount due from the resident.
- Once the Notice to Quit has expired, a summary process action is filed with the court to commence legal action. A summons is served upon the resident by a constable that requires the resident to make an appearance in court. Unless an agreement is reached between the SHA and tenant and filed with the court, the case is then heard by the Court, who will render a decision.
- If the Court rules in favor of the SHA, a judgment is awarded demanding payment. After ten days from the entry of judgment (and where there is no stay, pending appeal, or certain post-judgment motions), the SHA has the right to request a writ of execution for possession and on money judgment.
- If the resident does not vacate the leased premises or pay the SHA as the parties may agree, the SHA may levy the writ of execution for possession and on money judgment to forcible evict the tenant. The SHA will provide at least **seven days** notice of the date and time of the levy.

IX. DISCONTINUING EVICTION ACTION

The SHA is under no obligation to discontinue eviction proceedings once legal action has been initiated. However, it is not in the interest of either party for SHA to proceed with an eviction against a resident who is generally a prompt rent payer and has a positive rent-paying history.

X. RESIDENT EVICTION EXPENSES

Once a legal action has been filed in Court against a resident and the court rules in favor of the SHA, the resident may be subject to payment of constable fees, court filing costs and moving costs associated with the eviction.

XI. VACATED RESIDENT DEBT

SHA reserves the right to pursue collection of all amounts properly due from residents evicted or voluntarily vacating SHA premises. The SHA will utilize all available means of collection, including referrals to credit bureaus, collection agencies and other court actions.

XII. UNCOLLECTABLE RESIDENT DEBT / DEBT WRITE-OFFS

On an annual basis, the Executive Director, in consultation with the Director of Finance and Legal Counsel will determine which tenant accounts receivable are uncollectable and will expense them off the financial books, subject to the approval of the SHA Board of Commissioners.

XIII. ENFORCEMENT OF THIS POLICY

This Policy is enforced by the staff and Legal Counsel, through the administrative grievance procedure (federal developments only) and the Somerville District Court or the Eastern Housing Court.

Adopted by the SHA Board of Commissioners on

APPENDIX A: COMMUNITY SUPPORT AGENCIES

HELP WITH RENTAL AND UTILITY ARREARS

Community Action Agency of Somerville (CAAS)

Housing Advocacy Program (HAP)

66-70 Union Square, Suite 104, Somerville, MA 02143

Apply at caasomerville.org/hap-application or call 617-623-7370

Somerville Homeless Coalition (SHC)

Address: 1 Davis Square, Somerville, MA 02144

Apply at somervillehomelesscoalition.org/rapid-response or call 617-623-6111

Metro Housing Boston – RAFT (Massachusetts Emergency Housing Payment Assistance)

1411 Tremont Street, Boston, MA 02120-3401

617-859-0400; Toll-Free: 800-272-0990

Apply at metrohousingboston.org

Just A Start

1035 Cambridge Street #12, Cambridge, MA 02141

Contact Housing Stabilization Case Manager Jamison Rudd at 617-918-7510 or

jamisonrudd@justastart.org

Somerville Office of Housing Stability (OHS)

City Hall Annex

50 Evergreen Avenue, Somerville, MA 02145

Submit a referral form at bit.ly/OHS-Referral or call at 617-625-6600, Ext. 2581

LEGAL ASSISTANCE AND ADVOCACY

Cambridge and Somerville Legal Services (CASLS)

60 Gore Street, Suite 203, Cambridge, MA 02141

617-603-2700

Community Action Agency of Somerville (CAAS)

66-70 Union Square, Suite 104, Somerville, MA 02143

Apply at caasomerville.org/hap-application or call 617-623-7370

De Novo Center for Justice and Healing

47 Thorndike Street, Cambridge, MA 02141

617-661-1010

Harvard Legal Aid Bureau

23 Everett Street, #1, Cambridge, MA 02138

617-495-4408

Open during school year (from September to April)

Updated 10/13/2023

Definition of Significant Amendment or Modification to the Agency Plan

1. The Housing Authority of the City of Somerville (SHA) considers a major change in the content of the 2023 Agency Plan to consist of one or more of the following: Revision(s) that impacts LIPH or HCV Waiting List preferences and selection sequence, changes in LIPH lease provisions, LIPH or HCV rent calculations, or LIPH Grievances Procedures or HCV Informal Hearing Procedures.
2. Modifications to the LIPH Capital Fund Program by adding a new non-emergency work item exceeding 25% of the total CFP Grant for that specific year.
3. Amendments to the Project-based Voucher (PBV) allocation under which the SHA intends to provide PBV assistance under 24 CFR 983 regulatory requirements.
4. Revisions to LIPH policies on pets.
5. Conversion of any LIPH Property to homeownership.
6. Submission of a Demolition and Disposition Application to the Special Application Center (SAC) under the requirements of Section 18 of the 1937 Housing Act and 24 CFR 970 regulatory requirements.
7. Modification to Community Service Requirements.
8. Submission of a revised Allocation Plan for Designated Housing to the U.S. Department of Housing & Urban Development (HUD) that alters the overall set-aside targets for elderly, disabled or near elderly.

For this fiscal year, the following actions are NOT to be considered major Amendment or Modification to the Agency Plan. These matters have been identified for the RAB as part of the process resulting in the baseline Housing Agency Plan for FY 2024.

1. Revisions to the Housing Choice Voucher (HCV) Program Administrative Plan to address program integrity, customer service and to implement policies and procedures to improve management of program utilization levels.
2. Revisions to the LIPH Admission & Continued Occupancy Policy (ACOP) to address program integrity and improve customer service.
3. Changes to the ACOP to implement new program requirements and options under the Housing Opportunities through Modernization Act (HOTMA).
4. Revisions to screening standards for both LIPH and HCV Programs considering any changes in Massachusetts Law or best practices concerning applicant qualification for a unit offer.
5. Decisions to open or close an LIPH or HCV waiting list or waiting list category for a specific period.
6. Clarifications to written tenant selection procedures for unit offers pursuant to LIPH properties covered by the HUD Approved Allocation Plan for Designated Housing.
7. More detailed policies and procedures for use of HCV resources provided by the U.S Department of Housing & Urban Development specifically as mitigation of LIPH waiting list impacts of the HUD approved Allocation Plan for Designated Housing.

SOMERVILLE HOUSING AUTHORITY
Admissions Policy for Deconcentration

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

BOARD RESOLUTION
NOVEMBER 10, 1999

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

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

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

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

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

Capital Fund Program - Five-Year Action Plan

FY23 Federal Annual Plan Somerville Housing Authority

Status: Draft

Approval Date:

Approved By:

Part I: Summary						
PHA Name : Somerville Housing Authority			Locality (City/County & State)			
PHA Number: MA031			<input checked="" type="checkbox"/> Original 5-Year Plan		<input type="checkbox"/> Revised 5-Year Plan (Revision No:)	
A.	Development Number and Name	Work Statement for Year 1 2023	Work Statement for Year 2 2024	Work Statement for Year 3 2025	Work Statement for Year 4 2026	Work Statement for Year 5 2027
	CIAMPA MANOR (MA031000020)	\$59,477.10		\$191,971.50		\$40,000.00
	AUTHORITY-WIDE	\$652,264.90	\$652,264.90	\$652,264.90	\$652,264.90	\$652,264.90
	PROPERZI MANOR (MA031000021)	\$1,008,592.00	\$45,927.10	\$222,406.10		
	BRADY TOWERS (MA031000319)	\$100,000.00	\$806,720.00	\$623,691.50	\$998,069.10	\$788,069.10
	MYSTIC VIEW APT (MA031000311)	\$50,000.00	\$365,422.00	\$180,000.00	\$220,000.00	\$390,000.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 1 2023				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CIAMPA MANOR (MA031000020)			\$59,477.10
ID0080	(Force Account) Ciampa Manor Kitchen and Bath Remodel Phase 6(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets)	Update old kitchens and baths in need of replacement at Ciampa Manor. This is part of a continued phased project. Phase 6		\$59,477.10
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0106	Administration(Administration (1410)-Other,Administration (1410)-Salaries)	Administration Fees		\$186,361.40
ID0107	Operations(Operations (1406))	Routine Operating Expenses		\$465,903.50
	PROPERZI MANOR (MA031000021)			\$1,008,592.00
ID0121	Replace Elevator at Properzi Manor(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other)	Update and/or replace all existing components for one elevator at Properzi Manor. Both elevators are at the end of their useful life.		\$501,872.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 1 2023				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0151	Properzi Electrical Upgrades(Dwelling Unit-Interior (1480)-Electrical)	Replace all load centers, smoke detectors, and intercoms at Properzi Manor.		\$506,720.00
	BRADY TOWERS (MA031000319)			\$100,000.00
ID0186	Federal Elderly Intercoms Phase 2(Dwelling Unit-Interior (1480)-Electrical)	Improve and replace intercoms systems at Federal Elderly Developments		\$100,000.00
	MYSTIC VIEW APT (MA031000311)			\$50,000.00
ID0187	Mystic View Electrical/GFI Requirements(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other)	Replacement of the GFI breakers underneath the sinks in kitchens, to meet electrical code requirements.		\$50,000.00
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 2		2024		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	MYSTIC VIEW APT (MA031000311)			\$365,422.00
ID0060	Administration Office Emergency Generator(Non-Dwelling Interior (1480)-Mechanical)	New emergency generator to be installed at Mystic Development.		\$175,422.00
ID0135	Mystic View - Roof Replacement Phase 4(Dwelling Unit-Exterior (1480)-Roofs)	Roof Replacement Mystic View		\$190,000.00
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0133	Administration(Administration (1410)-Other)	Administrative costs		\$186,361.40
ID0134	Operations(Operations (1406))	Routine Operating Costs		\$465,903.50
	BRADY TOWERS (MA031000319)			\$806,720.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
2		2024		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0137	Highland Elevator Modernization(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other)	Upgrade existing elevator at Highland Gardens.		\$306,720.00
ID0138	Properzi Manor - Elevator Modernization(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical)	Modernization of Elevator 2		\$500,000.00
	PROPERZI MANOR (MA031000021)			\$45,927.10
ID0158	(Force Account) Properzi Kitchens and Baths Phase 2 (Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Flooring (non routine),Dwelling Unit-Interior (1480)-Interior Doors,Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets,Dwelling Unit-Interior (1480)-Plumbing)	Renovate kitchens and baths at Properzi Manor.		\$45,927.10
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 3 2025				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	MYSTIC VIEW APT (MA031000311)			\$180,000.00
ID0139	Mystic View Roof Replacement Phase 5(Dwelling Unit-Exterior (1480)-Roofs)	Replace shingle roofs at Mystic View.		\$180,000.00
	BRADY TOWERS (MA031000319)			\$623,691.50
ID0140	Walk-In Shower Installs at Federal Elderly's(Dwelling Unit-Interior (1480)-Tubs and Showers)	Install new walk-in showers as needed at Federal Elderly buildings.		\$30,000.00
ID0143	(Force Account) Weston Manor Kitchen and Bath Renovations(Dwelling Unit-Interior (1480)-Appliances,Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets)	Remove and install new kitchen and baths at Weston Manor.		\$75,000.00
ID0144	Weston Manor Window Replacements Phase 2(Dwelling Unit-Exterior (1480)-Windows)	Replace second half of tenant windows at Weston Manor		\$406,720.00
ID0147	Brady Towers Storm Door Replacement(Dwelling Unit-Exterior (1480)-Exterior Doors)	Remove and install new storm doors at Brady Towers.		\$111,971.50

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
3		2025		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CIAMPA MANOR (MA031000020)			\$191,971.50
ID0141	(Force Account) Ciampa Manor Kitchen and Baths Phase 7(Dwelling Unit-Interior (1480)-Appliances,Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets)	Replace the kitchen and baths in Ciampa Manor.		\$70,000.00
ID0148	Ciampa Manor Storm Door Replacement(Dwelling Unit-Exterior (1480)-Exterior Doors)	Remove and install new storm doors at Ciampa Manor.		\$111,971.50
ID0161	Ciampa Manor Walk-In Shower Installs(Dwelling Unit-Interior (1480)-Plumbing)	Install new walk-in showers as needed at Federal Elderly buildings.		\$10,000.00
	PROPERZI MANOR (MA031000021)			\$222,406.10
ID0142	(Force Account) Properzi Kitchen & Bath Renovations Phase 3(Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets,Dwelling Unit-Interior (1480)-Appliances,Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks)	Remove and install new kitchens and baths at Properzi Manor.		\$78,634.80
ID0159	Federal Elderly Intercoms Phase 3(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Install new intercom systems in federal elderly buildings.		\$133,771.30

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 3 2025				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0160	Properzi Manor Walk-In Shower Installs(Dwelling Unit-Interior (1480)-Plumbing)	Install new walk-in showers as needed at Federal Elderly buildings.		\$10,000.00
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0145	Admin(Administration (1410)-Other)	Administrative duties.		\$186,361.40
ID0146	Operations(Operations (1406))	Operational duties.		\$465,903.50
	Subtotal of Estimated Cost			\$1,870,334.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
4	2026			
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0165	Administration (Administration (1410)-Other,Administration (1410)-Salaries)	Administration Fees		\$186,361.40
ID0166	Operations(Operations (1406))	Routine Operating Expenses		\$465,903.50
	MYSTIC VIEW APT (MA031000311)			\$220,000.00
ID0167	Mystic View Roof Replacement(Non-Dwelling Exterior (1480)-Roofs)	Roof Replacement Mystic View		\$220,000.00
	BRADY TOWERS (MA031000319)			\$998,069.10
ID0168	Highland Elevator Modernization(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Electrical)	Upgrade existing elevator at Highland Gardens		\$446,720.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
4	2026			
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0169	Brady Towers Landscaping(Non-Dwelling Site Work (1480)-Landscape)	Improve landscaping at Brady Towers		\$75,000.00
ID0170	Highland Balcony Painting(Dwelling Unit-Exterior (1480)-Exterior Paint and Caulking)	Repaint Balcony Highland Gardens		\$150,000.00
ID0171	Weston Exhaust Fans(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Electrical)	Upgrade exhaust fans at Weston Manor		\$63,877.10
ID0172	Brady Towers Surveillance (Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Upgrade Surveillance System at Brady		\$55,000.00
ID0173	Federal Boiler Heatwatch Software(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing)	Upgrade all federal boilers		\$107,472.00
ID0174	Walk In Shower Installs at Fedreal Elderly's(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Commodes,Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing)	New shower surrounds installations		\$100,000.00
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5		2027		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	BRADY TOWERS (MA031000319)			\$788,069.10
ID0175	Walk In Shower Installs at Federal Eldery's(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Commodes,Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing,Dwelling Unit-Interior (1480)-Tubs and Showers)	Install new shower setups during turnover of elderly units.		\$100,000.00
ID0177	Federal Ederly Surveilance Upgrades(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Improve surveilance system at a federal elderly		\$100,000.00
ID0183	Highland Garden Sprinkler Line(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing)	Install sprinkler line at Highland Garden		\$100,000.00
ID0184	Highland Garden Electrical Upgrades(Dwelling Unit-Interior (1480)-Electrical)	Improve smoke detectors, intercom, and load centers at Highland Garden.		\$380,000.00
ID0185	Elderly Site Improvements (Dwelling Unit-Site Work (1480)-Asphalt - Concrete - Paving,Dwelling Unit-Site Work (1480)-Curb and Gutter,Dwelling Unit-Site Work (1480)-Dumpsters and Enclosures,Dwelling Unit-Site Work (1480)-Fencing,Dwelling Unit-Site Work (1480)-Landscape,Dwelling Unit-Site Work (1480)-Other,Dwelling Unit-Site Work (1480)-Parking,Dwelling Unit-Site Work (1480)-Storm Drainage,Dwelling Unit-Site Work (1480)-Striping)	Improve site improvements at Federal Elderly Developments		\$108,069.10
	CIAMPA MANOR (MA031000020)			\$40,000.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5		2027		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0178	Ciampa Manor Kitchens and Baths Phase 8(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets,Dwelling Unit-Interior (1480)-Plumbing,Dwelling Unit-Interior (1480)-Tubs and Showers)	Renovate kitchens and baths of vacant units		\$40,000.00
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0179	Adminstration(Administration (1410)-Salaries)	Administration Expenses		\$186,361.40
ID0180	Operations(Operations (1406))	Operations Expenses		\$465,903.50
	MYSTIC VIEW APT (MA031000311)			\$390,000.00
ID0181	Mystic View Fire Alarm System Upgrade(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Update the fire alarm system at the Mystic View Development. Update and replace fire alarm panels, add radio boxes, smoke/heat/CO detectors in the apartment and common areas		\$150,000.00
ID0182	Mystic View Security Screens(Dwelling Unit-Exterior (1480)-Windows)	Install Security Screens on Mystic View windows.		\$240,000.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5 2027				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	Subtotal of Estimated Cost			\$1,870,334.00

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 1	2023
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration(Administration (1410)-Other,Administration (1410)-Salaries)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 2	2024
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration(Administration (1410)-Other)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 3	2025
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Admin(Administration (1410)-Other)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 4	2026
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration (Administration (1410)-Other,Administration (1410)-Salaries)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 5	2027
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration(Administration (1410)-Salaries)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Somerville Housing Authority

Exhibit 7, PHA Annual Plan Fiscal Year Beginning 4/1/2024

Federal Capital Plan Draft				
YEAR 2024	YEAR 2025	YEAR 2026	YEAR 2027	YEAR 2028
Mystic View Roof Replacement Phase 4 - \$220k	Mystic View Roof Replacement Phase 5 - \$180k	Mystic View Roof Replacement Phase 6 - \$220k	Walk In Shower Installs at Federal Elderly's- \$100k	Brady Towers Balcony Painting- \$250k
Administration Office Emergency Generator- \$175k	(Force Account) Ciampa Manor Kitchens and Baths Phase 7- \$73k	Walk In Shower Installs at Federal Elderly's- \$100k	(Force Account) Ciampa Manor Kitchens and Bath Phase 8- \$40k	Federal Electrical Upgrades- \$500k
Highland Elevator Modernization - \$500k	(Force Account) Weston Manor Kitchens and Baths - \$75k	Brady Towers Landscaping - \$76k	Federal Ederly Surveillance Upgrades- \$100K	Weston Manor Intercoms- \$120k
(Force Account) Properzi Kitchens and Baths Phase 2 - \$45k	(Force Account) Properzi Kitchens and Baths Phase 3 - \$78k	Highland Balcony Painting - \$150k	Mystic View Fire Alarm System- \$150k	Federal Eldery Site Improvements Ph.2-\$120k
Mystic View Electrical/GFI Requirement- \$70K	Weston Manor Window Replacements Phase 2 - \$400k	Highland Elevator Modernization - \$440k	Mystic View Security Screens- \$240k	Mystic View Site Work- \$120k
Highland Garden Sprinkler Line- \$200k	Ciampa Manor Storm Door Replacement- \$111k	Weston Exhaust Fans - \$63k	Federal Elderly Site Improvements- \$120k	Walk In Shower Installs at Federal Elderly's- \$50k
	Brady Towers Storm Door Replacement- \$111k	Brady Towers Surveillance Upgrades - \$55k	Highland Garden Electrical Upgrades- \$460k	(Force Account) Weston Manor Kitchens and Baths- \$50k
	Federal Elderly Intercoms Ph. 3 - \$133k	Boiler (All Federal) Heatwatch Software Upgrades - \$107k		
	Walk In Shower Installs at Federal Elderly's- \$50k			
AMP1 Total- \$465,000.00	AMP1 Total- \$180,000.00	AMP1 Total- \$220,000.00	AMP1 Total- \$390,000.00	AMP1 Total- \$120,000.00
AMP2 Total- \$745,000.00	AMP2 Total- \$1,031,000.00	AMP2 Total- \$991,000.00	AMP2 Total- \$820,000.00	AMP2 Total- \$1,090,000.00
Operations- \$465,903.50	Operations- \$465,903.50	Operations- \$465,903.50	Operations- \$465,903.50	Operations- \$465,903.50
Administration- \$186,361.40	Administration- \$186,361.40	Administration- \$186,361.40	Administration- \$186,361.40	Administration- \$186,361.40
\$1,863,614.00	\$1,863,614.00	\$1,863,614.00	\$1,863,614.00	\$1,863,614.00

Statement of Housing Needs and Strategy for Addressing Housing Needs.

According to the City of Somerville's *FY2018-2022 Consolidated Plan*, the overwhelming housing problem facing the residents of Somerville is a housing cost burden. The housing cost burden disproportionately impacts the city's low- and moderate-income residents. At the same time the city – and region – are experiencing historically low vacancy rates, and the Consolidated Plan cites a demographic trend of increasing single person households occupying all types of units, placing added pressure on supply, and reducing the availability of affordable family-sized units. According to the Consolidated Plan, this has caused many households to be forced into overcrowded conditions or be forced into units that are considered substandard.

The City of Somerville's *FY2018-2022 Consolidated Plan* and data from the Assessment of Fair Housing also cite that Black, Hispanic, Native American, and other non-Hispanic Somerville residents experience higher rates of the four housing problems – incomplete kitchen facilities, incomplete plumbing facilities, more than 2 persons per bedroom, and cost burden greater than 40% - than White and Asian or Pacific Islander Somerville residents. Just under 40% of Somerville residents in all the race/ethnicity categories experienced these issues.

Overall, the *Consolidated Plan* cites several contributing factors to the affordability crisis:

- Income and wage growth have not kept pace with the appreciation in housing costs and the standard cost of living.
- Federal resource programs such as the Housing Choice Voucher (HCV) Program, do not match the need experienced to compete with market rates.
- The appreciation in home sale asking prices has caused home-ownership to move further out of reach for low-income and moderate-income residents.
- The lack of vacant land ready to development and high per s/f costs for property for either rehabilitation, conversion from commercial to residential, and certainly demolition and new construction perpetuates the impediments to increasing the supply of not just affordable housing but any housing.
- Necessary infrastructure and public facility improvements (including water, sewer, and utilities) is also an obstacle to smart growth and new housing development.

As instructed in HUD’s Agency Plan Desk Guide, the SHA rated the impact of several factors on the housing needs of families in the jurisdiction, by family type.

Family types include: families with income less than or equal to 30 percent of area median income (AMI); families with income greater than 30 percent but less than or equal to 50 percent of AMI; families with income greater than 50 percent but less than 80 percent of AMI; elderly families; families with disabilities; and family type by race/ethnicity.

A rating of “1” indicates “no impact.” “5” indicates “severe impact.”

Housing Needs of Families in the Jurisdiction Served by the PHA							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <=30% AMI	5,175	5	5	4	3	4	4
Income >30% but <=50% AMI	3,600	5	5	4	3	4	4
Income >50% but <80% AMI	4,055	5	5	4	3	4	4
Elderly Families	6,425	5	5	3	4	3	4
Families with individuals with disabilities	6,351	5	5	3	4	4	4
Race – White	10,075	4	4	3	3	4	4
Race – Black	1,088	5	5	4	3	5	4
Race – Asian	1,195	4	4	3	3	4	4
Race – Native American	69	5	5	4	3	5	4
Race – Pacific Islander	4	4	4	3	3	4	4
Ethnicity – Hispanic	1,525	5	5	4	3	5	4

Data sources:
City of Somerville 2018-2022 Consolidated Plan, Housing Needs Assessment
US Census Data ACS 2014-2019

As instructed in HUD’s PHA Plan Desk Guide, the SHA compiled information about the families on the SHA’s Low Income Public Housing (LIPH) and Housing Choice Voucher (HCV) Program waiting lists. This information is provided below.

Housing Needs of Families on the Public Housing Waiting List*			
	# of Families	% of Total Families	Annual Turnover
Waiting List Total	1,998		N/A
Extremely Low Income <=30% AMI	1,773	89%	
Very Low Income (>30% but <=50% AMI)	185	9%	
Low Income (>50% but <80% AMI)	35	2%	
Families with Children	536	27%	
Elderly Families	631	32%	
Families with Disabilities	620	31%	
Race – White	672	34%	
Race – Black	509	25%	
Race – Asian	79	4%	
Race – Alaska Native or American Indian	8	0%	
Race – Pacific Islander	0	0%	
Race – Other	729	36%	
Ethnicity – Hispanic	444	22%	
Ethnicity – Non-Hispanic	1,554	78%	
Characteristics by Bedroom Size			
0 BR	0	0%	
1 BR	1,347	67%	
2 BR	437	22%	
3 BR	169	8%	
4 BR	22	1%	
5+ BR	23	1%	
Is the Waiting List Closed?	No		

Source: PHA Web Waiting List Statistical Summary Report; data as of 9/8/2023

The SHA has 1,998 applicants on its LIPH Waiting List, which is an increase of 5% over the prior year. The greatest need for housing in the Public Housing program continues to be one-bedroom units, which is currently 1,347 applicants followed by two-bedroom units, (437 applicants). We continue to see the affordable one-bedroom demand continue to grow throughout our housing programs. An overwhelming majority of applicants (89%) report a household income at or below 30% of AMI.

Housing Needs of Families on the Housing Choice Voucher (HCV) Program Waiting List			
	# of Families	% of Total Families	Annual Turnover
Waiting List Total (local)	2,042		N/A
Extremely Low Income <=30% AMI	1,594	78%	
Very Low Income (>30% but <=50% AMI)	370	18%	
Low Income (>50% but <80% AMI)	62	3%	
Families with Children	448	22%	
Elderly Families	389	19%	
Families with Disabilities	337	17%	
Race – White	845	41%	
Race – Black	638	31%	
Race – Asian	156	8%	
Race – Alaska Native or American Indian	27	1%	
Race – Pacific Islander	16	1%	
Ethnicity – Hispanic	551	27%	
Is the Waiting List Closed?	No		

Source: SHA Waitlist Report, *AffordableHousing.com*; data as of 9/8/2023

The SHA has 2,042 local applicants on its HCV Waiting List. Approximately seventy-eight (78%) of these applicants report household income at or below thirty percent (30%) of the AMI.

The need for housing choice vouchers is spread amongst all family types – families with children, elderly, and families with an individual with a disability. Households in HCV housing search continue to experience impediments to finding units within the SHA’s payment standard.

To combat this hardship, effective August 1, 2023, the SHA adopted the Small Area Fair Market Rents (SAFMR) for Boston, Cambridge, and Somerville area codes to implement payment standards that are more fine-tuned to the local housing market.

As instructed in HUD’s PHA Plan Desk Guide, below are strategies and reasons for employing these strategies that the SHA will undertake in the coming year to address the needs outlined above.

Possible Strategies for Addressing Housing Needs	Indicates Adopted Strategies	Reasons for Employing Strategies
Maximize the number of affordable housing units available to the PHA within its current resources	X	The region has a severe shortage of accessible, affordable housing.
Increase the number of affordable housing units	X	Decrease homelessness and high rate of housing cost-burdened households.
Target available assistance to families at or below 30% of AMI	X	83% of the applicants on the SHA’s waiting lists earn below 30% of AMI.
Target available assistance to families at or below 50% of AMI	X	14% of the applicants on the SHA’s waiting lists earn between 30 and 50% of AMI.
Target available assistance to the elderly	X	The <i>Consolidated Plan</i> notes a need to ease housing cost burden for elderly households, many of whom are on fixed income and experience rising housing costs.
Target available assistance to families with disabilities	X	Individuals with disabilities can experience housing instability and/or barriers to accessibility.
Increase awareness of PHA resources among families of races and ethnicities with disproportionate need	X	SHA is committed to continuing to reach populations with disproportionate housing needs.

The following activities will support the above strategies for addressing housing needs for low-income individuals and families:

- Promote unit turnover within the SHA LIPH Program by improving the ability of economically stabilized households with the wherewithal to make the transition to become home-owners on a regional basis.
- Continue efforts to stabilize families by working with community partners to assist residents and promote workforce readiness through continued operation of SHA’s FSS Program and by funding provider grants for programs directly benefiting SHA residents.
- Continue to invest in capital expenditures at SHA-owned properties to ensure a marketable and healthy environments for eligible residents.
- Continue to make modifications to LIPH units to enhance accessibility and honor reasonable requests for physical accommodation(s) whenever possible.
- Track the impact of SAFMR implementation for SHA’s Housing Choice Voucher (HCV) Program. Consider seeking a waiver from the U.S. Department of Housing & Urban Development (HUD) to apply SAFMR HCV payment standards by census tract.
- Maximize the use of Project-based Vouchers under the regulatory requirements of 24 CFR 983 as a tool in the development of long-term affordable housing within the City of Somerville.
- Continue to promote collaboration with local service providers for distribution of information about housing and supportive service options.

(REFERRED TO IN PLAN AS EXHIBIT C)
 FINANCIAL RESOURCES
 SOMERVILLE HOUSING AUTHORITY

Financial Resource: PROJECTED/ESTIMATED 2024 Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY2022 grants)		
a) Public Housing Operating Fund	2,929,326	Daily Operations
b) Public Housing Capital Fund 2023	1,876,219	Federal Mod
c) Annual Contribution SRO Tenant Based Assistance	133,056 24,192	Haps SRO 1& 3 Admin
d) HOPE VI Demolition	0	
e) Annual Contribution for Section 8 Tenant –Based Assistance	23,479,289 1,939,678	Haps Sec 8 & Admin
f) Annual Contribution for Mainstream Tenant –Based Assistance	1,843,927 202,532	Haps Mainstream & Admin
g) Resident Opportunity and Self Sufficiency Grants ROSS FSS ROSS 3 year	 191,987 0	Resident Services
h) Community Development Block Grant	N/A	
i) HOME	N/A	
Other Federal Grants (list below)		
2. Prior Year Federal Grants (un-obligated funds only) (list below)		
Capital Fund 2020	0	P H Capital Improvements
Capital Fund 2021	0	P H Capital Improvements
Capital Fund 2022	434,594	P H Capital Improvements
3. Public Housing Dwelling Rental Income	4,024,484	PH OPERATIONS
4. Other income (list below)		
Excess Utility		
Miscellaneous / Laundry Receipts	12,922	PH OPERATIONS
Investment	8,700	PH OPERATIONS
5. Non-Federal Sources		
Non dwelling rent: rooftop antenna leases	433,375	PH OPERATIONS
Total Resources	37,534,281	

SOMERVILLE HOUSING AUTHORITY RENT COLLECTION POLICY

I. POLICY STATEMENT

This policy is adopted by the Somerville Housing Authority (SHA) and applies to all residents in both state and federal housing. It addresses the manner in which residents must pay their monthly rent and the consequences of late payment or non-payment of rent due to SHA. This policy is consistent with the laws of the Commonwealth of Massachusetts, HUD regulations, EOHLC regulations, and SHA's Dwelling Leases. The SHA is committed to enforcing this policy in an equitable and non-discriminatory manner.

The Rent Collection Policy is designed to achieve the following goals:

- Maintain the SHA's resident accounts receivable at no more than 5%.
- Clarify for both resident and staff, the SHA's posture with regard to rent collection.
- Establish guidelines extending Repayment Agreements in appropriate circumstances as defined by the SHA or for retroactive rent charges.
- Streamline and simplify the legal process used by SHA.

II. MONTHLY RENT

In accordance with HUD regulations, residents of federal developments are charged 30% of their monthly adjusted income for rent. Adjusted income is calculated by deducting from gross income allowable expenses, such as childcare and medical, as well as deductions for dependents and elderly households. Eligibility for specific allowances depends upon the tenant's individual circumstances.

Residents of state elderly/handicapped developments who pay no utilities are charged 30% of net monthly income and residents of family developments who pay no utilities are charged 32% of net monthly income.

In state developments where utilities are paid by the resident, a resident's share of rent is based on 30% of income in family housing and 25% of income in elderly/handicapped housing. (*See Section IV below*).

In federal developments where utilities are paid by the resident, a utility allowance is deducted from the rent. In federal developments where residents provide a refrigerator an allowance is deducted from the rent. (*See Section IV below*).

III. RENT PAYMENTS

Rent shall be paid by (1) mailing to SHA's Lock Box at Eastern Bank to: Somerville Housing Authority, Post Office Box 277, Medford, MA 02155; (2) tendering in person at any Eastern Bank branch; or (3) by contacting the SHA Housing Manager to set up automatic payment from the resident's bank account. Residents when paying rent at the bank will include a rent coupon (which is obtained from the resident's housing manager) with their payment. Agencies which are paying rent on behalf of a resident may mail or hand-deliver the rent to the SHA's Administrative Office, who will date-stamp a copy of the payment and, upon request, provide a receipt. Agencies may also pay rent on behalf of a tenant via electronic deposit.

Rent is due and payable on the first of each month. However, where a resident receives a monthly benefit on third day of the month (e.g. SSDI) or such other day within the first seven days of the month, then upon the resident's request, the due date shall be the first business day following the scheduled receipt of the benefit. Additionally, a resident may request, in writing, an alternative rent payment schedule (such as paying twice per month in accordance with receipt of income) which request shall not be unreasonably denied. In the event that the resident shall fail to pay all or any part of the rent within seven (7) days of its due date, the SHA may consider the unpaid rent delinquent and issue a Private Conference Notice. Except where Tenant (in state-aided public housing) has been habitually delinquent in paying rent and has had a prior opportunity for discussion within the prior six (6) months, the SHA shall provide the (state-aided public housing) Tenant with an opportunity to discuss the reason for the late payment. For all federal public housing tenants, the SHA shall offer the Tenant an opportunity to discuss the reason for the late payment of rent.

Inquiries about rents due and the collection process should be directed to the site management offices. These offices do not accept rent payments. Office hours and contact information will be posted on the SHA website and to site management offices. Where a manager is on vacation or other leave, the manager shall so indicate the dates of absence and person(s) covering on his/her telephone and email and posting in a location accessible to residents of that development.

Rent payment in full is required by the SHA. SHA does, however, reserve the right to accept partial payments.

The SHA provides residents with a grace period to pay their rent. Residents who have failed to make full payment by 4:00 PM on the seventh calendar day of each month are considered delinquent unless there is a different agreed upon rent payment schedule. If the seventh calendar day of the month falls on a weekend or holiday, rent will not be considered delinquent until 4:00 PM the next business day. Residents who pay their full rent but fail to pay miscellaneous charges properly due may also be subject to legal action in accordance with their Lease Agreement.

The SHA will not charge late fees (or interest) for a tenant's failure to pay rent when due.

IV. UTILITIES AND MISCELLANEOUS CHARGES

Utilities and quantities of such utilities to be supplied to each resident are included in the resident's monthly rent, with the following exceptions. Residents of Mystic View Apartments and James Corbett Apartments are responsible for direct payment of electric lighting services and residents of Mystic River Apartments are responsible for payment of their electric for cooking and lighting

service. For all federal developments a \$25.00 per year charge will be added to the Total Tenant Payment of residents for each air conditioner installed by the household.

Other miscellaneous charges may be assessed to residents for damages to the premises, equipment therein, development buildings, facilities, or common areas caused by residents, household members, or guests¹. Normal wear and tear is expected. Where damage is caused by a perpetrator of domestic violence (and that person does not live in the unit or is removed from the unit), the resident will not be charged for such damage.

Residents shall be notified in writing of such other miscellaneous charges and the right and procedure to request a grievance hearing to contest said charges.

V. RENT DISPUTES

Residents of federal developments who wish to dispute the amount of rent or other charges billed may do so through the SHA's Grievance Procedure in effect at the time the grievance or appeal arises. Copies of the Grievance Procedure are posted in each management office and management staff can assist residents with informally settling the grievance and scheduling any subsequent hearing.

Pursuant to M.G.L. c.121B, §32 and the SHA lease for state-aided units, residents residing in state units are not provided an opportunity for a grievance hearing in the event of nonpayment of rent but they are provided the opportunity for a grievance hearing if they dispute the rent calculation

VI. RESTRICTIONS ON EVICTIONS BASED ON HIGH INCOME

The SHA shall not commence eviction proceedings or refuse to renew a lease based upon the income of the resident family unless:

1. (Federal developments) If, **after January 1, 2025**, a resident family is “over income” for 24 consecutive months, then their lease will be terminated in six months after the end of those 24 months and they will need to move. “Over income” is defined as having household income of more than 120% of the area median income for the Boston-Cambridge-Quincy area for that household size. This is explained in detail in Chapter 13 of the SHA’s Admissions and Continued Occupancy Policy.
2. (State developments) 32% (for family developments) or 30% (for elderly/disabled developments) of the Resident’s net household income equals or exceeds the fair market rent for Somerville under the Section 8 housing choice program and the Resident cannot show there to be a hardship that prevents relocation of the household to unsubsidized housing, thus allowing a 6-month exemption. If the Resident’s net household income decreases such that the 32 or 30% no longer equals or exceeds the applicable fair market rent, then any notice of tenancy termination shall be withdrawn.

VII. REPAYMENT AGREEMENTS

Where there are circumstances involving hardship and in cases of retroactive rent charges, SHA may enter into a "Repayment Agreement" extending the time allowed residents to make full payment of money that is owed. Repayment agreements are made at the discretion of the SHA

¹ Where an apartment or building is scheduled for demolition or extensive rehabilitation, then Residents will not be assessed charges for such damage unless deliberately caused.

and shall generally be in the form of a court ordered agreement for judgment. The SHA is under no obligation to approve and execute repayment agreements and does so only as an accommodation to residents or where otherwise required to do so by law (as in the case of a reasonable accommodation to a resident with a disability). Once a judgment is entered, residents failing to make the required court ordered payments may be subject to further action including eviction by SHA upon a court's allowance of a motion for issuance of execution after hearing.

Other unforeseen circumstances and income disruptions which typically pose financial hardships (e.g., loss of job, permanent discontinuation or reduction in benefits) entitle residents to request an interim reexamination. For federally-aided public housing, a rent reduction is effective the first of the month in which an income decrease was reported (where reported no later than the 15th of the month) and effective the first of the following month after the income decrease was reported (where reported after the 15th of the month), subject to the SHA obtaining verification of the change. For state-aided public housing, a rent reduction is effective on the first of the month following verification of the change but SHA will reduce the rent effective on the first day of the month following report of the change where the delay in verifications was not due to the fault of the tenant. Failure to report a decrease in income is generally not considered a hardship unless a medical reason or other extenuating circumstances existed which prevented the resident from reporting or verifying the decrease in income.

Residents who need assistance with financial problems may contact their Housing Manager for information and referral to community agencies. See Appendix A for possible sources of funding and services.

Where a Resident has complied with a repayment agreement and has not had a subsequent repayment agreement for two (2) years, the SHA shall indicate that the resident has timely paid rent on any request for a landlord reference.

VIII. SUMMARY PROCESS ACTION

Non-payment of rent is considered a serious violation of the Lease Agreement between the resident and the SHA. In all cases, SHA will aggressively pursue collection of the amount of rent due and eviction, if necessary. Action is taken against residents for only the amount of rent due. Collection for any physical damages to the unit and other charges (excluding court costs as stated below) are regarded as a separate matter. The following is a description of the steps taken and notices issued:

- In the event that Tenant shall fail to pay all or any part of the rent within seven (7) days of its due date, the SHA may consider the unpaid rent delinquent and issue a Notice to Quit. Prior to issuing such a notice, except where a state-aided public housing Tenant has been habitually delinquent in paying rent and has had a prior opportunity for discussion within the prior six (6) months, the SHA shall provide the Tenant with an opportunity to discuss the reason for the late payment at a Pre-Termination Conference and (for federally-aided public housing) a Grievance Hearing
- A Pre-Termination Conference Notice is prepared by the Housing Manager within seven (7) days of the rent being delinquent. The notice shall cite the lease violation. The notice schedules the time, date, and location of the conference. The notice is mailed to the resident.
- At the Pre-Termination Conference, the Housing Manager and the resident shall

discuss the rent due. If a state-aided resident fails to pay the rent due at or before the Private Conference a thirty (30) day Notice to Quit will be served on the Tenant via constable. If a federally-aided resident fails to pay the rent due at or before the Private Conference, then a summary of the private Conference (with notice of grievance rights) will be prepared and sent to the resident. The thirty (30) day Notice to Quit may be served on the federally aided resident only after the SHA receives a favorable decision after a grievance hearing or the time for the resident to request a grievance hearing has expired without such a request being made.

- The Notice to Quit shall cite the lease violation and is served by a constable to each delinquent resident. If the notice is left at the last and usual place of abode it must also be mailed to the resident. The City of Somerville's current Housing Stabilization Notice and any other required state notices will be served with the Notice to Quit.
- The Notice indicates that, for legal action to be discontinued, the rent due must be paid in full by the date by which an answer in a summary process action is due. . If a resident offers full payment of the rent due (including any subsequent month) by this date, the payment will be accepted and no further action taken to evict the resident. Full payment may include a firm written commitment from an agency to pay the balance. If the rent is not paid in full by that due date, the SHA may proceed with legal action and may assess a fee covering court expenses for serving a Notice to Quit, serving summary process summons and complaint, and a filing fee. These court fees may be added to the total amount due from the resident.
- Once the Notice to Quit has expired, a summary process action is filed with the court to commence legal action. A summons is served upon the resident by a constable that requires the resident to make an appearance in court. Unless an agreement is reached between the SHA and tenant and filed with the court, the case is then heard by the Court, who will render a decision.
- If the Court rules in favor of the SHA, a judgment is awarded demanding payment. After ten days from the entry of judgment (and where there is no stay, pending appeal, or certain post-judgment motions), the SHA has the right to request a writ of execution for possession and on money judgment.
- If the resident does not vacate the leased premises or pay the SHA as the parties may agree, the SHA may levy the writ of execution for possession and on money judgment to forcible evict the tenant. The SHA will provide at least **seven days** notice of the date and time of the levy.

IX. DISCONTINUING EVICTION ACTION

The SHA is under no obligation to discontinue eviction proceedings once legal action has been initiated. However, it is not in the interest of either party for SHA to proceed with an eviction against a resident who is generally a prompt rent payer and has a positive rent-paying history.

X. RESIDENT EVICTION EXPENSES

Once a legal action has been filed in Court against a resident and the court rules in favor of the SHA, the resident may be subject to payment of constable fees, court filing costs and moving costs associated with the eviction.

XI. VACATED RESIDENT DEBT

SHA reserves the right to pursue collection of all amounts properly due from residents evicted or voluntarily vacating SHA premises. The SHA will utilize all available means of collection, including referrals to credit bureaus, collection agencies and other court actions.

XII. UNCOLLECTABLE RESIDENT DEBT / DEBT WRITE-OFFS

On an annual basis, the Executive Director, in consultation with the Director of Finance and Legal Counsel will determine which tenant accounts receivable are uncollectable and will expense them off the financial books, subject to the approval of the SHA Board of Commissioners.

XIII. ENFORCEMENT OF THIS POLICY

This Policy is enforced by the staff and Legal Counsel, through the administrative grievance procedure (federal developments only) and the Somerville District Court or the Eastern Housing Court.

Adopted by the SHA Board of Commissioners on

APPENDIX A: COMMUNITY SUPPORT AGENCIES

HELP WITH RENTAL AND UTILITY ARREARS

Community Action Agency of Somerville (CAAS)

Housing Advocacy Program (HAP)

66-70 Union Square, Suite 104, Somerville, MA 02143

Apply at caasomerville.org/hap-application or call 617-623-7370

Somerville Homeless Coalition (SHC)

Address: 1 Davis Square, Somerville, MA 02144

Apply at somervillehomelesscoalition.org/rapid-response or call 617-623-6111

Metro Housing Boston – RAFT (Massachusetts Emergency Housing Payment Assistance)

1411 Tremont Street, Boston, MA 02120-3401

617-859-0400; Toll-Free: 800-272-0990

Apply at metrohousingboston.org

Just A Start

1035 Cambridge Street #12, Cambridge, MA 02141

Contact Housing Stabilization Case Manager Jamison Rudd at 617-918-7510 or

jamisonrudd@justastart.org

Somerville Office of Housing Stability (OHS)

City Hall Annex

50 Evergreen Avenue, Somerville, MA 02145

Submit a referral form at bit.ly/OHS-Referral or call at 617-625-6600, Ext. 2581

LEGAL ASSISTANCE AND ADVOCACY

Cambridge and Somerville Legal Services (CASLS)

60 Gore Street, Suite 203, Cambridge, MA 02141

617-603-2700

Community Action Agency of Somerville (CAAS)

66-70 Union Square, Suite 104, Somerville, MA 02143

Apply at caasomerville.org/hap-application or call 617-623-7370

De Novo Center for Justice and Healing

47 Thorndike Street, Cambridge, MA 02141

617-661-1010

Harvard Legal Aid Bureau

23 Everett Street, #1, Cambridge, MA 02138

617-495-4408

Open during school year (from September to April)

Updated 10/13/2023

Definition of Significant Amendment or Modification to the Agency Plan

1. The Housing Authority of the City of Somerville (SHA) considers a major change in the content of the 2023 Agency Plan to consist of one or more of the following: Revision(s) that impacts LIPH or HCV Waiting List preferences and selection sequence, changes in LIPH lease provisions, LIPH or HCV rent calculations, or LIPH Grievances Procedures or HCV Informal Hearing Procedures.
2. Modifications to the LIPH Capital Fund Program by adding a new non-emergency work item exceeding 25% of the total CFP Grant for that specific year.
3. Amendments to the Project-based Voucher (PBV) allocation under which the SHA intends to provide PBV assistance under 24 CFR 983 regulatory requirements.
4. Revisions to LIPH policies on pets.
5. Conversion of any LIPH Property to homeownership.
6. Submission of a Demolition and Disposition Application to the Special Application Center (SAC) under the requirements of Section 18 of the 1937 Housing Act and 24 CFR 970 regulatory requirements.
7. Modification to Community Service Requirements.
8. Submission of a revised Allocation Plan for Designated Housing to the U.S. Department of Housing & Urban Development (HUD) that alters the overall set-aside targets for elderly, disabled or near elderly.

For this fiscal year, the following actions are NOT to be considered major Amendment or Modification to the Agency Plan. These matters have been identified for the RAB as part of the process resulting in the baseline Housing Agency Plan for FY 2024.

1. Revisions to the Housing Choice Voucher (HCV) Program Administrative Plan to address program integrity, customer service and to implement policies and procedures to improve management of program utilization levels.
2. Revisions to the LIPH Admission & Continued Occupancy Policy (ACOP) to address program integrity and improve customer service.
3. Changes to the ACOP to implement new program requirements and options under the Housing Opportunities through Modernization Act (HOTMA).
4. Revisions to screening standards for both LIPH and HCV Programs considering any changes in Massachusetts Law or best practices concerning applicant qualification for a unit offer.
5. Decisions to open or close an LIPH or HCV waiting list or waiting list category for a specific period.
6. Clarifications to written tenant selection procedures for unit offers pursuant to LIPH properties covered by the HUD Approved Allocation Plan for Designated Housing.
7. More detailed policies and procedures for use of HCV resources provided by the U.S Department of Housing & Urban Development specifically as mitigation of LIPH waiting list impacts of the HUD approved Allocation Plan for Designated Housing.

SOMERVILLE HOUSING AUTHORITY
Admissions Policy for Deconcentration

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

BOARD RESOLUTION
NOVEMBER 10, 1999

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

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

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

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

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

Capital Fund Program - Five-Year Action Plan

FY23 Federal Annual Plan Somerville Housing Authority

Status: Draft

Approval Date:

Approved By:

Part I: Summary						
PHA Name : Somerville Housing Authority			Locality (City/County & State)			
PHA Number: MA031			<input checked="" type="checkbox"/> Original 5-Year Plan		<input type="checkbox"/> Revised 5-Year Plan (Revision No:)	
A.	Development Number and Name	Work Statement for Year 1 2023	Work Statement for Year 2 2024	Work Statement for Year 3 2025	Work Statement for Year 4 2026	Work Statement for Year 5 2027
	CIAMPA MANOR (MA031000020)	\$59,477.10		\$191,971.50		\$40,000.00
	AUTHORITY-WIDE	\$652,264.90	\$652,264.90	\$652,264.90	\$652,264.90	\$652,264.90
	PROPERZI MANOR (MA031000021)	\$1,008,592.00	\$45,927.10	\$222,406.10		
	BRADY TOWERS (MA031000319)	\$100,000.00	\$806,720.00	\$623,691.50	\$998,069.10	\$788,069.10
	MYSTIC VIEW APT (MA031000311)	\$50,000.00	\$365,422.00	\$180,000.00	\$220,000.00	\$390,000.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 1 2023				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CIAMPA MANOR (MA031000020)			\$59,477.10
ID0080	(Force Account) Ciampa Manor Kitchen and Bath Remodel Phase 6(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets)	Update old kitchens and baths in need of replacement at Ciampa Manor. This is part of a continued phased project. Phase 6		\$59,477.10
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0106	Administration(Administration (1410)-Other,Administration (1410)-Salaries)	Administration Fees		\$186,361.40
ID0107	Operations(Operations (1406))	Routine Operating Expenses		\$465,903.50
	PROPERZI MANOR (MA031000021)			\$1,008,592.00
ID0121	Replace Elevator at Properzi Manor(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other)	Update and/or replace all existing components for one elevator at Properzi Manor. Both elevators are at the end of their useful life.		\$501,872.00

Capital Fund Program - Five-Year Action Plan

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 1 2023				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0151	Properzi Electrical Upgrades(Dwelling Unit-Interior (1480)-Electrical)	Replace all load centers, smoke detectors, and intercoms at Properzi Manor.		\$506,720.00
	BRADY TOWERS (MA031000319)			\$100,000.00
ID0186	Federal Elderly Intercoms Phase 2(Dwelling Unit-Interior (1480)-Electrical)	Improve and replace intercoms systems at Federal Elderly Developments		\$100,000.00
	MYSTIC VIEW APT (MA031000311)			\$50,000.00
ID0187	Mystic View Electrical/GFI Requirements(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other)	Replacement of the GFI breakers underneath the sinks in kitchens, to meet electrical code requirements.		\$50,000.00
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
	2	2024		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	MYSTIC VIEW APT (MA031000311)			\$365,422.00
ID0060	Administration Office Emergency Generator(Non-Dwelling Interior (1480)-Mechanical)	New emergency generator to be installed at Mystic Development.		\$175,422.00
ID0135	Mystic View - Roof Replacement Phase 4(Dwelling Unit-Exterior (1480)-Roofs)	Roof Replacement Mystic View		\$190,000.00
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0133	Administration(Administration (1410)-Other)	Administrative costs		\$186,361.40
ID0134	Operations(Operations (1406))	Routine Operating Costs		\$465,903.50
	BRADY TOWERS (MA031000319)			\$806,720.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
2		2024		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0137	Highland Elevator Modernization(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other)	Upgrade existing elevator at Highland Gardens.		\$306,720.00
ID0138	Properzi Manor - Elevator Modernization(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Mechanical)	Modernization of Elevator 2		\$500,000.00
	PROPERZI MANOR (MA031000021)			\$45,927.10
ID0158	(Force Account) Properzi Kitchens and Baths Phase 2 (Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Flooring (non routine),Dwelling Unit-Interior (1480)-Interior Doors,Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets,Dwelling Unit-Interior (1480)-Plumbing)	Renovate kitchens and baths at Properzi Manor.		\$45,927.10
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 3 2025				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	MYSTIC VIEW APT (MA031000311)			\$180,000.00
ID0139	Mystic View Roof Replacement Phase 5(Dwelling Unit-Exterior (1480)-Roofs)	Replace shingle roofs at Mystic View.		\$180,000.00
	BRADY TOWERS (MA031000319)			\$623,691.50
ID0140	Walk-In Shower Installs at Federal Elderly's(Dwelling Unit-Interior (1480)-Tubs and Showers)	Install new walk-in showers as needed at Federal Elderly buildings.		\$30,000.00
ID0143	(Force Account) Weston Manor Kitchen and Bath Renovations(Dwelling Unit-Interior (1480)-Appliances,Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets)	Remove and install new kitchen and baths at Weston Manor.		\$75,000.00
ID0144	Weston Manor Window Replacements Phase 2(Dwelling Unit-Exterior (1480)-Windows)	Replace second half of tenant windows at Weston Manor		\$406,720.00
ID0147	Brady Towers Storm Door Replacement(Dwelling Unit-Exterior (1480)-Exterior Doors)	Remove and install new storm doors at Brady Towers.		\$111,971.50

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year				
3	2025			
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CIAMPA MANOR (MA031000020)			\$191,971.50
ID0141	(Force Account) Ciampa Manor Kitchen and Baths Phase 7(Dwelling Unit-Interior (1480)-Appliances,Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets)	Replace the kitchen and baths in Ciampa Manor.		\$70,000.00
ID0148	Ciampa Manor Storm Door Replacement(Dwelling Unit-Exterior (1480)-Exterior Doors)	Remove and install new storm doors at Ciampa Manor.		\$111,971.50
ID0161	Ciampa Manor Walk-In Shower Installs(Dwelling Unit-Interior (1480)-Plumbing)	Install new walk-in showers as needed at Federal Elderly buildings.		\$10,000.00
	PROPERZI MANOR (MA031000021)			\$222,406.10
ID0142	(Force Account) Properzi Kitchen & Bath Renovations Phase 3(Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets,Dwelling Unit-Interior (1480)-Appliances,Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks)	Remove and install new kitchens and baths at Properzi Manor.		\$78,634.80
ID0159	Federal Elderly Intercoms Phase 3(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Install new intercom systems in federal elderly buildings.		\$133,771.30

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 3 2025				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0160	Properzi Manor Walk-In Shower Installs(Dwelling Unit-Interior (1480)-Plumbing)	Install new walk-in showers as needed at Federal Elderly buildings.		\$10,000.00
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0145	Admin(Administration (1410)-Other)	Administrative duties.		\$186,361.40
ID0146	Operations(Operations (1406))	Operational duties.		\$465,903.50
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 4 2026				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0169	Brady Towers Landscaping(Non-Dwelling Site Work (1480)-Landscape)	Improve landscaping at Brady Towers		\$75,000.00
ID0170	Highland Balcony Painting(Dwelling Unit-Exterior (1480)-Exterior Paint and Caulking)	Repaint Balcony Highland Gardens		\$150,000.00
ID0171	Weston Exhaust Fans(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Electrical)	Upgrade exhaust fans at Weston Manor		\$63,877.10
ID0172	Brady Towers Surveillance (Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Upgrade Surveillance System at Brady		\$55,000.00
ID0173	Federal Boiler Heatwatch Software(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing)	Upgrade all federal boilers		\$107,472.00
ID0174	Walk In Shower Installs at Fedreal Elderly's(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Commodes,Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing)	New shower surrounds installations		\$100,000.00
	Subtotal of Estimated Cost			\$1,870,334.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5 2027				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	BRADY TOWERS (MA031000319)			\$788,069.10
ID0175	Walk In Shower Installs at Federal Eldery's(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Commodes,Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing,Dwelling Unit-Interior (1480)-Tubs and Showers)	Install new shower setups during turnover of elderly units.		\$100,000.00
ID0177	Federal Ederly Surveilance Upgrades(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Improve surveilance system at a federal elderly		\$100,000.00
ID0183	Highland Garden Sprinkler Line(Dwelling Unit-Interior (1480)-Mechanical,Dwelling Unit-Interior (1480)-Other,Dwelling Unit-Interior (1480)-Plumbing)	Install sprinkler line at Highland Garden		\$100,000.00
ID0184	Highland Garden Electrical Upgrades(Dwelling Unit-Interior (1480)-Electrical)	Improve smoke detectors, intercom, and load centers at Highland Garden.		\$380,000.00
ID0185	Elderly Site Improvements (Dwelling Unit-Site Work (1480)-Asphalt - Concrete - Paving,Dwelling Unit-Site Work (1480)-Curb and Gutter,Dwelling Unit-Site Work (1480)-Dumpsters and Enclosures,Dwelling Unit-Site Work (1480)-Fencing,Dwelling Unit-Site Work (1480)-Landscape,Dwelling Unit-Site Work (1480)-Other,Dwelling Unit-Site Work (1480)-Parking,Dwelling Unit-Site Work (1480)-Storm Drainage,Dwelling Unit-Site Work (1480)-Striping)	Improve site improvements at Federal Elderly Developments		\$108,069.10
	CIAMPA MANOR (MA031000020)			\$40,000.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5		2027		
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0178	Ciampa Manor Kitchens and Baths Phase 8(Dwelling Unit-Interior (1480)-Bathroom Counters and Sinks,Dwelling Unit-Interior (1480)-Bathroom Flooring (non cyclical),Dwelling Unit-Interior (1480)-Interior Painting (non routine),Dwelling Unit-Interior (1480)-Kitchen Cabinets,Dwelling Unit-Interior (1480)-Kitchen Sinks and Faucets,Dwelling Unit-Interior (1480)-Plumbing,Dwelling Unit-Interior (1480)-Tubs and Showers)	Renovate kitchens and baths of vacant units		\$40,000.00
	AUTHORITY-WIDE (NAWASD)			\$652,264.90
ID0179	Adminstration(Administration (1410)-Salaries)	Administration Expenses		\$186,361.40
ID0180	Operations(Operations (1406))	Operations Expenses		\$465,903.50
	MYSTIC VIEW APT (MA031000311)			\$390,000.00
ID0181	Mystic View Fire Alarm System Upgrade(Dwelling Unit-Interior (1480)-Electrical,Dwelling Unit-Interior (1480)-Other)	Update the fire alarm system at the Mystic View Development. Update and replace fire alarm panels, add radio boxes, smoke/heat/CO detectors in the apartment and common areas		\$150,000.00
ID0182	Mystic View Security Screens(Dwelling Unit-Exterior (1480)-Windows)	Install Security Screens on Mystic View windows.		\$240,000.00

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 1	2023
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration(Administration (1410)-Other,Administration (1410)-Salaries)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 2	2024
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration(Administration (1410)-Other)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 3	2025
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Admin(Administration (1410)-Other)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 4	2026
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration (Administration (1410)-Other,Administration (1410)-Salaries)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Part III: Supporting Pages - Management Needs Work Statements (s)	
Work Statement for Year 5	2027
Development Number/Name General Description of Major Work Categories	Estimated Cost
Housing Authority Wide	
Administration(Administration (1410)-Salaries)	\$186,361.40
Operations(Operations (1406))	\$465,903.50
Subtotal of Estimated Cost	\$652,264.90

Somerville Housing Authority

Exhibit 7, PHA Annual Plan Fiscal Year Beginning 4/1/2024

Federal Capital Plan Draft				
YEAR 2024	YEAR 2025	YEAR 2026	YEAR 2027	YEAR 2028
Mystic View Roof Replacement Phase 4 - \$220k	Mystic View Roof Replacement Phase 5 - \$180k	Mystic View Roof Replacement Phase 6 - \$220k	Walk In Shower Installs at Federal Elderly's- \$100k	Brady Towers Balcony Painting- \$250k
Administration Office Emergency Generator- \$175k	(Force Account) Ciampa Manor Kitchens and Baths Phase 7- \$73k	Walk In Shower Installs at Federal Elderly's- \$100k	(Force Account) Ciampa Manor Kitchens and Bath Phase 8- \$40k	Federal Electrical Upgrades- \$500k
Highland Elevator Modernization - \$500k	(Force Account) Weston Manor Kitchens and Baths - \$75k	Brady Towers Landscaping - \$76k	Federal Ederly Surveillance Upgrades- \$100K	Weston Manor Intercoms- \$120k
(Force Account) Properzi Kitchens and Baths Phase 2 - \$45k	(Force Account) Properzi Kitchens and Baths Phase 3 - \$78k	Highland Balcony Painting - \$150k	Mystic View Fire Alarm System- \$150k	Federal Eldery Site Improvements Ph.2-\$120k
Mystic View Electrical/GFI Requirement- \$70K	Weston Manor Window Replacements Phase 2 - \$400k	Highland Elevator Modernization - \$440k	Mystic View Security Screens- \$240k	Mystic View Site Work- \$120k
Highland Garden Sprinkler Line- \$200k	Ciampa Manor Storm Door Replacement- \$111k	Weston Exhaust Fans - \$63k	Federal Elderly Site Improvements- \$120k	Walk In Shower Installs at Federal Elderly's- \$50k
	Brady Towers Storm Door Replacement- \$111k	Brady Towers Surveillance Upgrades - \$55k	Highland Garden Electrical Upgrades- \$460k	(Force Account) Weston Manor Kitchens and Baths- \$50k
	Federal Elderly Intercoms Ph. 3 - \$133k	Boiler (All Federal) Heatwatch Software Upgrades - \$107k		
	Walk In Shower Installs at Federal Elderly's- \$50k			
AMP1 Total- \$465,000.00	AMP1 Total- \$180,000.00	AMP1 Total- \$220,000.00	AMP1 Total- \$390,000.00	AMP1 Total- \$120,000.00
AMP2 Total- \$745,000.00	AMP2 Total- \$1,031,000.00	AMP2 Total- \$991,000.00	AMP2 Total- \$820,000.00	AMP2 Total- \$1,090,000.00
Operations- \$465,903.50	Operations- \$465,903.50	Operations- \$465,903.50	Operations- \$465,903.50	Operations- \$465,903.50
Administration- \$186,361.40	Administration- \$186,361.40	Administration- \$186,361.40	Administration- \$186,361.40	Administration- \$186,361.40
\$1,863,614.00	\$1,863,614.00	\$1,863,614.00	\$1,863,614.00	\$1,863,614.00